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ABSTRACT

Highlights of the Sixth Annual Meeting of the North Carolina Association for Institutional Research (NCAIR) and of the Drive-In Conference held prior to the annual meeting are presented. The major emphasis of the annual meeting was to look toward the 1980's and project the role that institutional research might play in higher education. The following addresses presented to the general sessions are included: "Old Values and New Realities" (Billy O. Wireman); "Surviving with the Uncertainties of the Future" (James R. Montgomery); and "State Government and Higher Education in the 1980's: Implications for Institutional Researchers" (Banks G. Talley, Jr.). The following addresses presented to the general sessions of the Drive-In Conference are also included: "The Federal Government Spends Billions on Student Aid--So What" (Joseph C. Creech); "The CHOICE Project" (Joan S. Stark); "Student Financial Aid: Facts, Myths, and Unanswered Questions" (Jonathan D. Fife); and "The Three R's: Revolution, Research and Remedy" (William M. Geer). The reports of the work group sessions on curricula, faculty, students, external funding, facilities, and administration are summarized. Agendas for the two meetings are included. The constitution and by-laws of the NCAIR and the NCAIR membership directory are appended. (SC)

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IR: A LOOK TOWARDS THE 1980's
and
INSTITUTIONAL RESEARCH
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PROCEEDINGS

Sixth Annual Meeting of the North Carolina Association For Institutional Research and the Drive-In Conference

U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

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Charles I. Brown
and
Timothy R. Sanford
Editors

HE 011 650

Sheraton Center, Charlotte, November 1-2
Mid Pines Club, Southern Pines
August 10-11

1978

1978

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of

THE NORTH CAROLINA ASSOCIATION FOR INSTITUTIONAL RESEARCH

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IR: A LOOK TOWARD THE 1980's

AND

INSTITUTIONAL RESEARCH AND STUDENT AID

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1973 - Inaugural Proceedings of the North Carolina Association for Institutional Research, (Chapel Hill), ED 122672

1973 - The Institutional Research Practitioner: Problems, Processes and Procedures, (Charlotte), ED 098858

1974 - Long Range Planning, Attrition-Retention and Graduate Follow-Up Studies, (Winston-Salem), ED 118049

1975 - Enrollment Projections, (Boone)

1976 - Functional Models of Institutional Research, (Greensboro), ED 145768

1977 - Issues/Higher Education/Institutional Research, (Asheville)

1978 - IR: A Look Toward the 1980's (Charlotte); and Drive-In Conference, (Southern Pines)

Requests for NCAIR publications should be directed to Timothy R. Sanford, NCAIR Secretary and Assistant Director of Institutional Research, University of North Carolina-Chapel Hill, 27514 or ERIC Document Reproduction Service, P. O. Box 190, Arlington, Virginia 22210.

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PROGRAM AND CONTRIBUTORS TO NCAIR'S 6TH
ANNUAL MEETING
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WEDNESDAY, NOVEMBER 1, 1978

10:00 - 1:00 Pre-Opening Session Activities
Registration; Annual Report Display; Publications Display
Bulletin Board Posting of IR Projects (Continuous
Throughout Meeting)

1:00 - 2:30 Opening General Session, Ben H. Romine, President NCAIR,
Presiding - Welcome and Remarks; Business Session

Speaker: Billy O. Wireman, President, Queens College,
"Old Values and New Realities"

2:30 - 3:00 Coke/Coffee Break

3:00 - 4:00 Work Group Sessions - TRENDS FOR IR
1. Curricula - Dalton P. Brooks, Pembroke State University
2. Faculty - James Morrison, UNC-Chapel Hill
3. Students - Nathaniel L. Felder, UNC-Asheville
4. External Funding - Edwin R. Chapman, Western Piedmont
Community College
5. Facilities - William H. Gilmore, NC State Com. HE Facilities
6. Administration - Robert M. Ussery, East Carolina University

4:00 - 5:00 Second General Session, REPORTS from group discussion with
list of TRENDS FOR IR

6:00 - 7:00 Social Hour

7:00 - 9:00 Dinner

Speaker: James R. Montgomery, Past-President, AIR 1966-67
Director of Institutional Research, Virginia
Polytechnic Institute and State University
"Surviving with the Uncertainties of the Future"

THURSDAY, NOVEMBER 2, 1978

8:30 - 9:00 Breakfast Meeting/Caucases

9:00 - 11:00 Third General Session, Robert M. Ussery, Presiding Officer
Speaker: Banks G. Talley, Vice Chancellor Student Affairs,
North Carolina State University
"State Government and Higher Education in the 1980's;
Implications for Institutional Researchers"

Panelists
Thomas B. Brewer, Chancellor, East Carolina University
John E. Weems, President, Meredith College
Raymond A. Stone, President, Sandhills Community College

Adjournment

HIGHLIGHTS OF THE SIXTH ANNUAL MEETING

OF THE

NORTH CAROLINA ASSOCIATION FOR INSTITUTIONAL RESEARCH

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Ben M. Seelbinder, President, NCAIR

There were approximately 55 persons who registered at the Sixth Annual Meeting of the North Carolina Association for Institutional Research, which was held at the Sheraton Center in Charlotte, N.C. on November 1-2, 1978. The major emphasis of the meeting was to look toward the 1980's and project the role which Institutional Research might play in higher education.

At the afternoon session on November 1, Dr. Billy O. Wireman, President of Queens College in Charlotte, spoke on "Old Values and New Realities." He pointed out that educators, faced with a vastly overbuilt educational enterprise, must acknowledge this new reality and scale back their programs to an economically manageable and educationally sound level. New realities which must be faced include career orientation, an emphasis on values, the value-added or individual-achievement concept and response to the disturbing theories which have been developed about the marginality of schools.

Following Dr. Wireman's talk, the participants divided into groups to discuss "Trends for IR." The six groups considered areas of involvement for IR and reported their conclusions in the second general session as follows:

I. Curricula. (moderated by Dalton P. Brooks--Pembroke State Univ.) What is the curriculum? This will be examined through faculty and administrative studies, through continued evaluations from student advising as well as input from employers of graduates and from external agents. We will be examining what is taught, when and by whom. There will be studies of competencies gained as related to the curriculum through attitudinal assessments and formal testing. II. Faculty. (moderated by James Morrison--UNC-CH). There will be more policy research in the following areas: 1) Tenure--what action to follow; 2) Role expectation of teaching faculty as related to advising, research activity teaching duties and service to the institution; 3) Staff planning for career and leadership development; 4) Student evaluations of faculty and services will be sought; 5) Faculty satisfaction will be examined with respect to peers, students, administration and professional development. III Students. (moderated by Nathaniel Felder--UNC-A). With the possibility of decline in enrollment being faced by some institutions, there is need to identify a potential pool of non-traditional students and assess the impact of adding a significant number of these students to the enrollments. There is need to identify the characteristics of an institution's student body. Also, longitudinal studies of trends as they relate to student matriculation need to be studied. IV. External Funding. (moderated by Edwin R. Chapman--Western Piedmont Community College.) In order to be successful in obtaining funds it would be helpful to become a member of reader lists for proposals and to know or have contact with directors of program funds in branches of government and foundations. It is necessary for an institution to show involvement in projects for which funds are being requested. A

good abstract for a proposal is essential. Ways of getting favorable action on requests can be improved through better narration and statement of data, concise budgets and clear projections of evaluation procedures. V. Facilities. (moderated by William H. Gilmore--N.C. State Commission on HE Facilities.) Institutions will have to examine the impact of requirements in Section 504 of the Rehabilitation Act of 1973 on their facilities and in turn the effects of compliance on support for other programs. Federal support for facilities is probably going to be based on up-grading facilities which will result in energy conservation. The question of providing adequate student housing on-campus, with a trend back to campus facilities due to inflationary costs of off-campus housing, will have to be considered. VI. Administration. It is necessary for institutions to define and analyze their mission and to put more emphasis on data management and information system development. Continued work on enrollment projections will have to be done with measures of learner interest and the nature of the learner. There must be a constant awareness of allocation of personnel for administration, faculty and staff. Ways should be sought by which administrative procedure can be improved through institutional research.

At the evening session, Dr. James R. Montgomery, an NCAIR member, who is Director of IR at Virginia Polytechnic Institute and State University, was the after dinner speaker. His topic was "Surviving with the Uncertainties of the Future." He suggested three broad directions for the future in which institutional researchers will probably be involved. These are 1) Greater regulation and policy making at the state and federal level; 2) Enrollment losses within the 18-21 year-old college age population; 3) The exportation of IR or management-type techniques into other parts of state government.

On Thursday morning, November 2, Dr. Banks C. Talley, Jr., Vice-Chancellor for Student Affairs at North Carolina State University, was the principal speaker with three panelists: Dr. Thomas B. Brewer, Chancellor, East Carolina University; Dr. John E. Weems, President, Meredith College; and Dr. Raymond A. Stone, President, Sandhills Community College. Dr. Talley spoke on "State Government and Higher Education in the 1980's: Implications for Institutional Research." He listed three areas of critical concern for higher education in the 1980's--enrollments, faculty and professional staff and financial aid for students. He agreed with Dr. Wireman that we are in a phasing-down period and that we will go through a period of re-evaluation during the 1980's. He then proceeded to list numerous research projects in which IR personnel might be involved. The panelists commented on Dr. Talley's remarks and suggested further research projects and the role of IR in pursuing them.

The 1979 meeting of NCAIR will again be held in conjunction with the North Carolina Association of Colleges and Universities in early November in Raleigh, N.C. The full report of the Sixth Annual meeting will be published in the annual proceedings of the association and will be available from Secretary Timothy R. Sanford, IR, UNC-CH, 02 South Building, 005A, Chapel Hill, N.C. 27514.

At the Business Session which was chaired by President Ben H. Romine, UNC-C, the secretary, Dianna B. Morris, ECU, reported that there were 85 individual memberships and 8 institutional memberships for 1978. Dr. Donald Reichard, UNC-G, reported on the task force progress with the proposed statewise follow-up study of 1979 graduates.

Officers elected to serve until the time of the next Annual Meeting in November 1979 were: President, Ben M. Seelbinder, Wake Forest University; President-elect, Robert M. Ussery, East Carolina University; Secretary, Timothy R. Sanford, UNC-Chapel Hill; Treasurer, Don P. Altieri, Caldwell Community College and Technical Institute; Members-at-Large, Linda F. Balfour, UNC-General Administration, Sally M. Horner*, Meredith College, and Linda K. Pratt, North Carolina Central University.

*Vietta M. Neal, Johnson C. Smith University, replaced Sally Horner in February 1979.

ADDRESSES - GENERAL SESSIONS

OLD VALUES AND NEW REALITIES

Billy O. Wireman, President, Queens College

While economic and political leaders are preoccupied with finding a solution to the crippling effects of economic inflation, educators must now come to grips with their own special brand of educational inflation. Educational inflation is a result of the disproportionately high percentage of the college age group - more than 40% - which have attended college over the past decade.

This tremendous expansion of college enrollments - from two million in 1950 to eleven million in 1978 - has meant a corresponding expansion of the whole educational enterprise - plant, faculties, programs, libraries and, of course, budgets. The Department of Health, Education and Welfare estimates that $111 billion was spent on all education in the United States last year, an amount which now makes "Big Education" along with "Big Business" and "Big Labor" as three of the major power complexes in America.

But this era of great educational expansion is now past.

For example, the 1972 Edition of Projections of Educational Statistics to 1981-82 projected 11.1 million college students in 1981. The 1975 Edition of the same publication projects 8.9 million students in 1982, a revision downward in three years of 20%. Elementary and secondary school enrollment has been revised downward from 49.8 million to 45.1 million by 1982. It is further estimated that the number of high school graduates will decline from 3.1 million in 1972-73 to 2.8 million in 1982-83. These revisions downward are a result of the steadily declining birth rate in America.

Clearly, the bull market for education is over.

Educators, faced with a vastly overbuilt educational enterprise, must acknowledge this new reality and scale back their programs to an economically manageable and educationally sound level.

There is a tragic irony in this new reality. At the very time when we need a creative and forward-thinking educational enterprise at all levels in America, we find increasingly a paralysis of fear. This need not be. Despite the gravity of their problems, educators can and must step forward with bold new ideas and solutions to deal with some very pressing educational issues. Failure in this task will only intensify the financial crisis facing education. As Fred Hechinger points out, "The evaporation of intellectual excitement has already led to loss of public interest, which, in turn, increases financial pressures. Whenever the public is left in uncertainity about the substance of an enterprise, enthusiasm to pay for it turns lukewarm." Education, then, faces a number of new realities.

Five of the most important ones are:

The relationship between formal education and preparation for a career. "Lockstep education," says Robert Taylor, Director, Center for Vocational and Technical Education, Ohio State University, "should be broken so students do not graduate without being contaminated by real life." Failure to break this educational lockstep will produce, according to the Carnegie Commission on Education, three million under-employed college graduates by 1980. Eighteen percent of the work force in 1980 will be college graduates, but the society can absorb only seven to eight percent. This is an enormous misuse of resources and the human and economic consequences of this misuse are staggering. Educators must find ways to tie together the interests and talents of the student in the early years with job opportunities and society's needs. Every academic department has the responsibility to point out the career implications of the subject they are teaching. The best vehicle through which work and study can be tied together is an internship in the community at large which permits students to study and work at the same time. This experience of integrating work and study will help students clarify early their career goals.

A second issue has to do with values. A pre-Watergate survey indicated that 60% of the American people felt that something was deeply wrong in America. That "something" is unquestionably a concern for values. People need to feel that someone cares. There must be transcendent, overarching values which tie us together. Erik Erikson, in Identity: Youth and Crisis, agrees: "The overriding issue," he says, "is the creation not of a new ideology but of a universal ethics growing out of a universal technological civilization. This can be advanced only by men and women who are neither ideological youths nor moralistic old men, but who know that from generation to generation the test of what you produce is the care it inspires."

Returning to basics in education, as some claim, is simply not enough. Talent can both create and destroy. Proficiency in arithmetic can be used to total the days' take from illicit drug sales or to calculate the amount of money raised for retarded children. The capacity to speak eloquently can stir a whole nation to self-destruction, as was the case with Hitler, or to rally a people to their best and noblest instincts as was the case with Winston Churchill in the Second World War. The pen that wrote the Declaration of Independence, without the value commitment of Thomas Jefferson, could just as easily have written the battle plan for Napoleon. So arithmetic, speaking, writing and other basic skills, alone, are not enough. These skills need a fundamental purpose. Strength and talent without humane direction are potentially very dangerous.

The ultimate value for education is human fulfillment - bringing into actuality what was there only potentially. Schools, then are laboratories where alchemists work, transforming human knowledge into human wisdom, reshaped to human hope and human understanding.

The third issue is the value-added or the individual-achievement concept of education. Educational institutions tend to deal with students on the assumption that they all start from the same point. Nothing, of course, could be further from the truth. From this erroneous assumption comes the practice of evaluating all students on the same pre-determined norm. The value-added or the individual-acheivement concept, which is an anathema to many educators, means that you take the student where he or she starts and move them as close to their maximum potential as possible. Consequently, progress is related more to where students started and the talents they started with, rather than how they compare to someone else.

The value-added or the individual-achievement concept operates on the assumption that within the realm of potential of every human being there is a level of achievement which can make life meaningful. This concept further suggests that it is the responsibility of educators to help the student find that level of achievement. When the student fails, the school and the teacher also fail. Precious few schools operate on that notion today.

Educators are going to have to deal with the rather disturbing findings of the research of Christopher Jencks, James Coleman and others which hold, essentially, that the school is much less a determinant in the lives of students than we had originally thought. American schools, this theory advances, are not doing the job they were thought to be doing. Home and television are more influential than schools, and there is very little relationship between educational quality and per capita expenditures on the schools. "The character of the school's output," says Jencks in Equality, "depends largely on a single input, namely the characteristics of the entering children. Everything else - the school budget, its policies, the characteristics of the teachers - is either secondary or completely irrelevant." This is revolutionary heresy in educational circles and, while Jencks' thesis has not stood the test of time, many parents, students and educators, realizing that something is seriously wrong, tend to give a lot more credence to this theory than we are willing to admit.

These five issues - career orientation, an emphasis on values, the value-added or individual-achievement concept and responding to this disturbing theory about the marginality of schools, present educators with a pressing national agenda.

Unfortunately, most of the educational concerns will continue to be with money. Certainly money is important, but it is only a condition and not a guarantee of educational effectiveness. Understandably, educational leadership today is rather demoralized by the magnitude of its fiscal problems. In a period of budgetary belt-tightening money available for new ideas, innovations and reforms tend to dry up.

This is both sad and shortsighted.

As we look to the last fifth of the Twentieth Century and beyond, we must experience some conceptual breakthroughs in planetary organization, energy, food, housing, waste disposal, communications, population control and ways to live harmonously with one another on an increasingly vulnerable Spaceship Earth. Because education should be oriented toward the future and ideas, we critically need a vital and dynamic educational enterprise. Unfortunately, we appear to be entering an era of retrenchment and fear. If educators permit this to happen, not only they but the society-at-large will be the losers.

Our task, then, in this time of economic crisis, is to keep the big picture in focus.

The relationship between wholeness and detail is brought into sharp focus by the pre-war Czechoslovakian president, Thomas Masaryk: "You see how it is," he said, "the method must be absolutely practical, reasonable, realistic, but the

aim, the whole, the conception is an eternal poem." The "eternal poem" to which educators must address themselves in this time of crisis is the old value of America's survival as a free and open society.

To be sure, we must be "practical, reasonable and realistic" but to lose sight of the "eternal poem" is to have lost our purpose, which, in the final analysis, is to have lost it all.

8

SURVIVING WITH THE UNCERTAINTIES OF THE FUTURE

James R. Montgomery
Director, Institutional Research
Virginia Polytechnic Institute and State University

The fun in thinking about the future and making predictions about it is that occasionally one is correct. One can then point to this element of success while hoping that the errors of omission or commission are forgotten. One tactic for success which goes back at least to Biblical time is to make prophecies sufficiently general to encompass a number of outcomes. I intend to suggest to you three broad directions for the future and some responses which are needed from us as we address them. But before addressing these issues let me first observe that I do so with optimism that the functions of institutional research will continue to be needed--in fact each of the areas for future direction point to the need for more activity from us. The key, of course, is how we respond. The three areas are the following:

1. Greater Regulation and Policy Making at the State and Federal level.

2. Enrollment losses within the 18-21 year-old college age population.

3. The exportation of Institutional Research or management-type techniques into other parts of State Government.

1. Greater Regulation and Policy Making

The desire to influence colleges and universities by special interest groups and by legislators and members of executive groups are increasingly evident. Manipulation from on high (meaning state councils, state boards, governmental officials at all levels, and legislators) has become increasingly an acceptable means to obtain desired ends. The centralization of policy setting and the greater regulatory requirements which accompany it will surely continue.

Formula Funding is a popular addition to state regulation. By 1973-74 at least 25 states had formula funding, and more have added the procedure since that time. Formulas have become part of the environment in which the presidents or chancellors in public institutions in all the southern states operate. These formulas may be reasonably simple or complex, but I believe that even a cursory study of the field suggests greater complexity for them.

The Higher Education General Information Survey (HEGIS) which arrived in the sixties was to help us by consolidating the federal questionnaires into one reporting scheme. I still remember the flurry of activity as we tried to get programs written to supply the responses from the computers which we were just then acquiring. But HEGIS reporting is easy compared with Title IX Affirmative Action. We can look for more federal reporting, for example, in areas such as the handicapped or senior citizens.

The State Coordinating Agencies and Super Boards emerged as states tried to obtain coordination for colleges and institutions growing rapidly as about 1 out of 2 of the youth aged 18-21 elected to enter college, and the numbers swelled yearly as a result of a long-term baby boom in the late 40's and 50's.

At present we have the following types of state agencies to oversee higher education:

1. Consolidated governing boards

2. Regulatory coordinating agencies

3. Advisory coordinating agencies

Despite the convictions of those toiling in institutions controlled by state regulating agencies or a super board controlling an entire state system that their system is the worst from a paper requirement-workload basis, their reporting requirements have tended to grow more alike. The reporting requirements have at times reached out to include cost analyses in the form of the Information Exchange Program of NCHEMS. IEP has been widely publicized by NCHEMS and legislators and state regulatory agencies have seized upon it as a means to collect cost figures. (I have commented on IEP earlier in "Formula Budgeting" in Allocating Financial Resources to Higher Education Revenues, Galen Drewry and C. P. Sellers, eds., U. of Alabama, 1977.) We can look for more IEP or cost analysis figures, however.

In my opinion IEP has yet to prove its usefulness on college campuses in administrative decision making. With so much data available and figures which surely must mean something, one is tempted to believe that the president and his staff should make use of them. Yet, problems abound in looking at cost figures. If one department has high costs, does this imply high quality or that professors are tenured and long established? Conversely, does a low cost signify a department making efficient use of its resources and deserving of greater support or could it be a new department whose faculty members are instructors and assistant professors and consequently less well paid, on the average, than departments with older staff? By the time one has made an effort to answer such questions, the administration has long since lost interest, and it is time to submit IEP for the next year anyway.

1a. Some Alternative Responses (Coping)

The theme I have been presenting, simply stated, is that regulations and policy making from afar will get worse in the 80's. Perhaps a few ideas are appropriate on possible responses.

The talents needed to cope with such requirements may be varied, but, in my opinion, they should include an ability to program a computer and to have some statistical (analytical) skills. The challenge becomes how to break free from the grind of reporting to the state council or governing board, the legislature, the U.S. Office of Education or other federal agency, and spend some time working for the agency which employs you. A truly effective institutional research operation is one which supplies the administration with information which helps in the operation of the institution(s) on a timely basis.

One needs to make an effort to analyze the data moving about the office and simplify it sufficiently that busy administrators can successfully use it or at least read it. Next one should visit the president and other appropriate persons in the administration who can and do obtain results and identify some

of their problems for which you can potentially supply useful information. A timely two-page report on your ranking among a set of peers on tuition costs could be far more useful than a year's worth of material from IEP, for example. One may survive a retrenchment if you are serving only as a reporter to outside agencies, but one will potentially enjoy life and work more when playing a role in the decision-making apparatus of the institution.

Try to see the person who is the potential user yourself, instead of working through an intermediary. Just because your boss is a vice president or director for this or that does not guarantee that he can translate to you the desire of others or your findings to them. In a nice way, find a means to visit in person the person for whom a study is designed.

The time has come to get tough on the assignments which accompany new regulations and requirements which arrive from afar. Come up with a realistic hourly cost figure and suggest that another agency be staffed to oversee the problem. One may not avoid the assignment, but at least one is on record as to the help needed and costs involved. There already are too many reporting assignments; unless effective action is taken now more will surely arrive.

2. Enrollment Losses

The prophets of doom are excitedly supplying information on the downturn in the number of youths reaching age 18. Naturally, such a decline potentially affects higher education. While the amount of this decline will vary by state, the important point, for our purposes, is the influence on institutional research.

2a. Response

A real possibility exists that a need will arise for a return to the activity which filled much of the time of institutional researchers in the 1960's, namely student surveys. Such surveys will be wanted, in fact required, as administrators search for ways to attract and retain students. We can expect to be asked for studies in the general areas of graduation-retention, grading, reasons for selecting or rejecting an institution, or student attitudes. Other possible sources for study include alumni, parents, and how to attract and retain non-traditional students. In other words, as administrators seek ways to retain students, they will need to know more about them and their attitudes.

Studies on faculty will occur as faculty have difficulty in moving and spend longer time on a single campus. Studies relating to retirement, tenure, salary requirements, and attitudes toward students and the institution should be expected.

Studies on students and faculty, to the extent they can be organized and completed, should bring a welcome change from the financial-oriented problems so frequently encountered at present.

3. Exportation of Institutional Research Techniques

Already agents in state government are turning to the campus for ideas on planning and management-type studies. The idea is to try such techniques on other state agencies.

3a. Response

If institutional researchers smile and observe that they deserve each other, perhaps it should not be too surprising. Should this occurrence gain momentum, the talents and techniques of many in the field will be called into service to assist with portions of this development.

4. Other Responses

Having reviewed three possible directions for the future, let me add some additional responses which are needed from us.

a. Several responses already have been suggested, for example, the need for more student and faculty studies or the requirement to move away from an outside reporting function and to enter into the decision-making and planning process.

b. The profession needs to develop more visibility and vitality if it is to survive in the 80's. In the October, 1978 issue of Change, there appears an article entitled, "100 Young Leaders of the Academy." In it the editors of Change proport to select a group of oncoming leaders in higher education. I recognized only one person within that list as currently a member of the Association for Institutional Research, although two additional persons on the list once belonged. Considering the diverse background of the individuals, perhaps one out of a hundred is not too bad. The point, however, is that institutional research needs more writers and speakers of national eminence. Paul Dressel perhaps came as close as anyone to serving this role in the past; someone or several someones need to take it for the future. While not all of us can obtain or desire to obtain that role, each of us can be professionals--and the mark of the professional, as I see it, is to read in the field, to write for internal and occasionally external consumption, to attend professional meetings, and to keep skills current. Certainly, a need exists and an opportunity is present to obtain visibility on the campus. As noted previously, make yourself useful and in turn you will make yourself indispensable. If we, as individuals, do our part, visibility and certainly vitality should occur.

c. To prepare for the 80's one needs to develop a personal and professional plan. We spend days, weeks, or years, planning for the institution or state--one should develop plans for himself/herself and for the employment of institutional research in the agency involved. It is true that such plans may be disrupted by shifting events, bad or good luck, or a myriad of other happenings but without a plan little good is likely to happen. Such planning may require no time lost from other activity, for it can move forward while one is driving, watching TV, or engaged in household activities.

d. As conditions change, and they surely will, we need to resolve to keep a sense of humor and to laugh at ourselves and as necessary at others and in the process seek to keep our sanity and enjoyment of life.

STATE GOVERNMENT AND HIGHER EDUCATION IN THE 1980's: IMPLICATIONS FOR INSTITUTIONAL RESEARCHERS

Banks C. Talley, Jr.
Vice-Chancellor of Student Affairs
North Carolina State University

These remarks are made to you from the perspective of a university administrator of 27 years, who served one year as the Executive Assistant to the Governor of North Carolina. In that role, I had the responsibility of organizing the Governor's office staff, the organization of the Office of Citizens' Affairs, and the new and very interesting function of serving as the Governor's liaison with his Cabinet-appointed Secretaries to help bring about the coordination and implementation of the administration's program in a cohesive fashion. Specifically, the liaison function included facilitating the passage of the written and verbal word between and among the Governor and the Secretaries and planning, along with others, the agenda for Cabinet meetings and retreats. In this position, I was privileged to read, hear, see, and learn a great deal about state government. It was a unique opportunity to serve the governor and the state, and I am grateful for the Governor's confidence in asking me to assume that role.

During the year, I did have an opportunity to gain an understanding of how higher education is viewed from a different perspective. In general, I found a healthy respect in state government for higher education. I did not detect any attitude of abandonment of higher educational support on the part of the executive or legislative branches. However, I did not find any great wave of interest in favor of giving higher education more attention. Only three issues in higher education created any special discussion in 1977 besides appropriations in general, and they were public aid for private institutions, the School of Veterinary Medicine at North Carolina State University, and the future of the UNC-TV system.

The most negative attitude I detected in state government concerning public higher education was in some areas of the Department of Administration. What that means for the future is a question unanswered.

The issues that did capture the attention of the Administration and the General Assembly in 1977 revolved around: economic issues - jobs for people - selected and increased industrialization of the state - crime control - an improved judicial system - an improved corrections system - public school issues such as the reading and testing programs - human resources issues, such as Medicaid and alcohol education, problems of the aging, and proper child care from conception through the early years of childhood--and appropriate regulations of the public utilities. Interestingly, two polls of public opinion on issues of concern reflected the same themes.

In 1977 there was a 1% reduction of personnel through all Cabinet-level departments and some efforts to reduce personnel in the University System. This action suggests a strategy for the future in freeing up budgeted monies for new uses.

Most importantly, in 1977 there was the officially announced Hunt administration campaign position on no new taxes during his four-year term. . . Governor Hunt's term runs through 1980.

Finally, there was an important state constitutional amendment change in 1977 approved by the General Assembly and ratified by vote of the people in November, and that was the amendment permitting the Governor to succeed himself.

All of these things in total seem to clearly say to me that higher education will not receive any special attention in terms of increased financial support beyond modest salary adjustments, inflation considerations, responses to HEW requirements (desegregation), Handicap barrier removals, etc. - and some capital construction during the 1979-81 budget period because there are other more pressing statewide issues and no major new tax resources. After 1981, it is hard to predict, but I cannot see now that it will be much different.

In a way, the Governor anticipated Proposition #13 in California, although California and North Carolina are entirely different states on taxes.

Recently, in 1978, the Governor announced that he will propose a tax rebate plan to the 1979 General Assembly giving all tax payers a specific one-time rebate.

These tax stances are public positions that the Governor has taken, and if he runs for reelection in 1980, he must maintain these positions if he is to have credibility. The mood of the public seems to confirm the no-tax increase position of the Governor. Therefore, the only new sources of state income for the budget will be from economic growth (which was good for 1978), thereby expanding the tax base, but the future in uncertain, or from a reduction in personnel force, such as the 1% in 1977, or from the reduction of other basic budget items such as the equipment reduction of 25% for the continuing budget for 1979-81, or the reduction of the allocation of appropriated funds for the final quarter of any budget year, or from a freezing of unfilled personnel positions such as occurred in the Holshouser administration, in order to create a reversion of funds, which would have the effect of creating a surplus at the end of a budget period. The demand and pressure for funds to maintain present state programs will increase as the 1980's start. As you know, the University System is asking for a 10% salary increase for 1979-81, and already the unofficial report is out that only around a 5% salary increase is in serious consideration for state employees in general and that includes the University with a "hold the line" on the other budget items.

Along with this position by state government, we continue to have a seemingly unmanageable inflation that is destroying our purchasing power in terms of personnel, operational funds, and new capital construction.

Therefore, in summary, on the financial front, I see an increasing struggle on the part of higher education to maintain its present position during the 1980's. I foresee the strong possibility that the clash between public and private institutions for state support will increase. I do not see any significant new programs in public higher education. I see only very limited funds for capital construction unless a public bond issue is proposed, and the outcome of that with the public is doubtful at this time.

In addition to this view of state government's direct involvement with higher education, let me mention some other critical concerns for higher education in the 1980's and their relationship to state government.

1. ENROLLMENTS - the birthrate decline of a few years ago will hit full force in the 1980's, and we all will face a significant reduction in the pool of young people who have traditionally gone to college. This means less tuition and fees from the usual student sources and a reduction in state support for the public and private sector. In the public sector we receive appropriations, not only for operations of all types, but specifically a teaching position for every 14.5 enrolled students. The private sector receives state funds based on North Carolina students enrolled in their institutions. This means less money for faculty, staff, and operations in general. It also suggests that we must look at that group of students who have not ordinarily gone to college in North Carolina. Our state record is not good in attracting this group. Only about 50% of the potential students in North Carolina go to college. However, in this group not traditionally attracted to college we will find many disadvantaged in economic, educational, and cultural terms. That means if we are to enroll more of this group, new recruitment devices, adjusted admissions standards, more financial aid, and more remedial academic work will be necessary. These will cost a great deal. Higher education probably will have to adjust its priorities and absorb the cost, if it moves in this direction.

   We must also look at other potential student pools such as working adults, housewives who never completed their undergraduate work, dissatisfied mid-career persons, corporations that want their employees to be updated, government agencies that want their employees to be re-certified, persons who want to take interest courses for no credit, etc. This means adjusting the delivery of undergraduate and graduate programs. Can higher education shift its resources and attract this new consumer market? It must do it to survive in its present state. It will not be easy, and new state monies will not be available to us to do it.

2. FACULTY AND PROFESSIONAL STAFF - There are a number of conflicting issues in this area such as the overproduction of potential new faculty and professional staff with shrinking student enrollments and no newly-created positions to absorb this overproduction. The inflation and increased cost of fringe benefits may have the result of further limitations on creating even a very few new positions or in continuing old ones. No one can accurately predict the impact of extending the retirement ages of faculty and professional staff, but if large numbers decide to continue in active work, this again reduces advancement and replacement possibilities for the younger faculty and those coming into the teaching stream. What about our affirmative action program that requires that progress be made in the employment of women and blacks? With few or no new teaching or administrative positions to fill, this places more demand on established positions that are already impacted with the new retirement laws.

   Finally, the issue of tenure is much more of a concern these days, and there is no doubt that it will be awarded much more carefully. With all, or a combination of these conflicting issues occurring in the 1980's, there

is a strong possibility that the faculty and professional staff of universities and colleges will be tempted to resort to unionization in North Carolina. If this should occur, it would present a new set of issues not only for higher education internally, but externally it would involve state government, possibly leading to new statutes dealing with unionization on the campus. This could discredit higher education even more in the eyes of the public, which does not appear to have much sympathy with the organized labor movement in North Carolina at the moment.

3. FINANCIAL AID FOR STUDENTS - Even though financial aid for needy students is handled primarily by the Federal government, there are a number of specialized programs of financial aid handled by the state. With the inflation, the need to increase these funds is obvious and for all the reasons mentioned earlier, it will be difficult for the state to respond with significant new or additional funding. The part-time adult student presently is not eligible for federal aid programs, and I believe we will begin to see some demand from this citizens group for not only federal aid but state help. And, finally, the public higher education sector is not only going to fight more openly to stop the public aid to private higher education but it is going to exert great pressure on the General Assembly to make the private sector more accountable for the aid they now receive for North Carolina students enrolled in their institutions.

These remarks are not intended to be pessimistic but rather realistic. I believe in the "pendulum theory of history" and I think higher education is now going through another transition period after having an intoxicating experience with great expansion and financial support in the 1960's. We are now in a phase-down period, and we will go through a period of re-evaluation during the 1980's. They will not be as bleak as the 1930's. Now is the time to use our intelligence and talent to prepare for the 1980's so that we can minimize the negative impact that events seem presently to hold for us. While I do also believe in those unforeseen events in history that can alter life in unexpected ways, I think we have the intelligence, talent, and tools to at least partially save ourselves and not rely solely on a miracle.

Let me also remind you that we have survived some major upheavals in the past ten years:

1. Student unrest over the Vietnam War
2. The searching of minority groups for greater access
3. Women's rights - ERA, Title IX
4. Special needs of the handicapped
5. The older student
6. The part-time student
7. The greater personal freedom of students in housing, alcohol usage, as sexual beings, and with drugs
8. The 18-year-old vote and full legal citizenship

With effective institutional research operations, I think we can gather information that we need, we can analyze it, and we can use it to plan and act effectively for the 1980's.

Let me suggest only a few research projects, and I hope the panel will add to these:

1. Budgets should be carefully studied and analyzed to see how they are being used and what are the results. New approaches need to be considered, and this information can be obtained from the literature, from special studies, from surveys, and from suggestions of the faculty, staff, and students.

2. Teaching loads need to be analyzed to see if the faculty is being used wisely to teach the maximum number of students or if new approaches are needed and, if so, what is most effective.

3. Course loads need to be analyzed to see if the faculty is carrying appropriate teaching assignments or if they could be changed and, if so, how.

4. Space utilization studies need to be conducted and more productive use of space needs to occur. I suspect that 15-hour days will not be uncommon in the use of institutional facilities in the very near future.

5. Enrollment projections need to be made with great care and study so that new target areas can be developed for the recruiting of students of all types.

6. Market surveys need to be conducted by the institutional researchers to see what the adult market may need and want from higher education.

7. Studies need to continue on the accessibility of higher education for the disadvantaged - what this entails in terms of recruitment, financial aid (87% of our black students are on aid), remedial work, and special programs of several types.

8. Studies need to be conducted on faculty retirement so that proper planning can be done for advising of the retiree and for the recruitment of new replacements, always considering affirmative action.

9. Serious study should be done on the potential dangers of the over-production of Ph.D.'s for teaching and research in higher education.

10. Tenure policies and the current status of tenured faculty need to be carefully studied and evaluated so that an institution does not overcommit its resources in the future.

11. Student financial aid needs to be reviewed and carefully studied so that efforts can be made to stay ahead of the inflation, or cut costs.

12. Consideration of merit/no-need scholarship programs call for careful study so that institutions truly select outstanding potential scholars and don't just buy students to fill vacancies.

13. Serious study and evaluation must be done to see if public aid to the private sector is really helping the private schools stay alive and healthy or is it merely briefly extending the life of some institutions that should close.

14. Studies should also be conducted to evaluate the public institutions to see if all 16 should continue to exist or if some should be merged, converted to community colleges, or closed.

15. Studies will be needed to guide higher education in the state on what position should be taken in relation to the new statewide minimum skills competency exams in reading and math. Should failure of these exams, which leads to a certificate of attendance and no high school diploma, be recognized by higher education in terms of denial of admission to higher education? What would this impact have on individual learners? What effect would it have on higher education in terms of enrollment, academic excellence, etc.?

16. In the testing area, we may need to ask if existing tests for admissions, placement, and programs of credit by examination are adequate or if we need to supplement our current programs with other information. If so, what and how?

17. Our researchers will need to help us determine what effect changing student abilities and curricula reforms will have on our present test instruments.

18. In the area of career planning and placement, we will need information from our researchers to evaluate and decide about the continued existence of certain academic programs, or the expansion or contraction of others. We may also ask our researchers to help evaluate career planning services in higher education to determine if the results we are obtaining are worth the cost.

19. Researchers will be called upon to evaluate information on many of the services offered within the university by Student Affairs, the Library, the Business Office, and others to see if these services are used by students and if they are essential.

20. Much effort has been made in higher education at considerable cost to develop learning assistance centers and remedial programs of all types. We will need our researchers to study these programs and efforts to see if they are really effective or if they are merely programs to ease our sensibilities when unprepared students who should never have been admitted have to leave the higher education scene.

21. Should we ask our researchers to develop programs of testing within the higher education scene to measure basic competency of college graduates? Could that lead us to certificates of attendance and no diploma for those not passing?

22. Can our researchers develop more student profile information on students attending our institutions of higher education to assist the leadership of colleges to plan and develop educational programs of all types that will respond more directly to the needs of our contemporary society?

23. Can our researchers be more effective in advising the academic community on programs and methods for advancing the most talented and academically able group of our students in a fashion to maximize their undergraduate learning experience?

This is only a partial list for researchers to consider for the 1980's. The panel will suggest others, I'm sure. I am convinced from my own experience that institutional research offices are absolutely essential for higher education today if we are to operate with intelligence and foresight. I commend you all for the contributions you are making to your individual institutions.

Keep your operation in a high state of effectiveness and help chart a wise course for higher education in North Carolina in the 1980's.

Note: Panelists expanding on these views were Thomas B. Brewer, Chancellor, East Carolina University; John E. Weems, President, Meredith College; and Raymond A. Stone, President Sandhills Community College.

THE DRIVE-IN CONFERENCE

A DRIVE-IN CONFERENCE has been a staple offering of NCAIR to its membership and other interested persons for several years, but for one reason or other this very popular and informative undertaking remained largely unreported save by word-of-mouth.

In redress of this omission and/or neglect, the 1978 NCAIR Proceedings includes what the editors (with apologies to all) believe to be the best features of the Annual Meeting and the Drive-In Conference. Along with these inclusions we would like to publicly acknowledge the yeoman's services contributed by the joint organizational Drive-In Conference Planning Committee. Accolades are therefore extended to Tim Sanford, Sally Horner, and Don Reichard of NCAIR and to Patsy Braxton and Tom Langston of the North Carolina Association of Student Financial Aid Administrators.

DRIVE-IN CONFERENCE
PROGRAM AND CONTRIBUTORS
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THURSDAY, AUGUST 10

12:00 - 1:00 Registration, Mid Pines Club

1:00 - 2:30 Opening Session, Convention Hall
Welcome & Announcements
Ben Romine, UNC-C, NCAIR President
Patsy Braxton, UNC-G, NCASFAA President
Ben Seelbinder, Wake Forest
NCAIR 1978 Annual Conference
Don Reichard, UNC-G
Follow-Up Study of Graduates
Speaker: "The Federal Government Spends Billions on Student Aid--So What!"
Joseph D. Creech, Western Carolina University
"The Student Aid Recipient Data Banks"
Jim Olliver, NCAICU
Introduction to the CHOICE Project
Joan Stark, University of Michigan

2:30 - 3:00 Coffee/Coke Break

3:00 - 4:00 Panel Discussion: "Working Relationships Between IR and Student Aid Offices on Campuses"
Sally Horner, Meredith College, Moderator
Jim Olliver, NCAICU
Don Reichard, UNC-G
Patsy Braxton, UNC-G
Charles Holcombe, Isothermal Community College

4:00 - 4:30 "Information for Students: Some Examples"
Robert Chapman, Learning Resources Network

4:30 - 5:30 "The CHOICE Project: An Overview"
Joan Stark, University of Michigan

6:00 - 7:30 Cocktails on the Terrace
-Mid Pines Invitational Putting Contest-

7:30 - Banquet, Main Dining Room
"Student Aid: What is Known and What We Need to Know"
Jonathan Fife, ERIC Clearinghouse on Higher Education

9:30 - Presidents' Reception, Terrace Cottage

FRIDAY, AUGUST 11

7:30 - 8:30 Breakfast at your leisure

8:30 - 10:00 CHOICE Workshop: "Applications in IR and Student Aid," Joan Stark

10:00 - 10:30 Coffee/Coke Break

10:30 - 11:30 Panel Discussion: "The State Perspective"
Stan Broadway, NCSEAA, Moderator
Charles George, NCSEAA
Duffy Paul, College Foundation, Inc.

11:30 - 12:30 Concurrent Discussion Sessions
1) "Campus Study of College Work-Study"
Mary Garren, UNC-CH
2) "Effects of Aid on College Graduates"
Tim Sanford, UNC-CH
3) "I've got some questions -- Can you offer some answers?" An Analysis of Student Aid Research Questions
Larry Gracie, NCSU
Pat Smith, NCSU

1:00 - 2:30 Luncheon, Main Dining Room
The Three R's: Revolution, Research, and Remedy
William M. Geer

James Carr, American College Testing Program, and Jerome Lee, College Scholarship Service, CEEB, are resource persons throughout conference.

ADDRESSES - GENERAL SESSIONS
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THE FEDERAL GOVERNMENT SPENDS BILLIONS ON STUDENT AID - SO WHAT!

Joseph D. Creech
Director of Academic Services
Western Carolina University

I think this is great getting financial aid people and institutional researchers together, and I hope this conference won't be a great disappointment to many of you. If you review the topics in your program, what I am going to try to do is relate to those a little bit and set the scene for some of these other folks who are going to follow me on the program. They have more data that I do, certainly more recent data, and I think I will probably answer more of your questions in terms of research methodologies. When I was talking to Tim about a title for this presentation, I happened to think of this one because I was right in the midst of reading an American Council on Education policy analysis report on a similar conference that was held last May. It was essentially about the effects of financial aid on students' decisions to go to college, and it occurred to me that what we are really talking about is not only federal government but state and federal governments spending millions of dollars each year on this whole area called student financial assistance. SO WHAT! As you begin reading through what we know about the impact of those dollars, "so what" becomes a very real question. Certainly in terms of my own participation and in terms of some of the research that has been done in financial aid, I feel it is a very good question.

Why do we need research in the student financial assistance area anyway? I know that later on Bill Geer is going to be speaking on this topic--those of you who know Bill and me, know we have been at it a long time, and I am not sure that either one of us has the answer to either one of the questions we have listed in the program; I do not want to mislead you into thinking that we do. I am sure, however, that Bill does have an answer, or at least he thinks he does, and if he and I run true to form, we will probably take different approach shots, we will both probably get to the green sometime, and we will probably miss the two-foot putt which is the object of the game. At any rate, I am going to attempt to put forth some answers, rather some questions, and perhaps suggest some ways for studying the problem. The whole issue is so complex that we sometimes think we need rather complex and sophisticated analyses of data. I think, at least in terms of my own involvement in four state-wide studies, that people want very simple answers. They are interested in three things: how much financial aid is needed, who needs it, and what form it should take; everything revolves about those particular items.

Let me just refer to something I put up here on the board. I stole it from a former colleague of mine, still friend, a guy by the name of Steve Ivens, who worked with me in the Southern Regional Office of the College Entrance Examination Board. We were on this particular topic one time and we put together what we call the Financial Aid Loop. It starts off, as you can see, from the top with something called a National, State and local economy and, given the condition of the economy, then that is where your basic interest for student financial aid

legislation originates. You note that as we go through this particular layout, we have two branches: what we call for lack of better terms, philanthropic legislation and conservative legislation. By conservative legislation we really mean that you do not get as much money as you ought to, and by philanthropic legislation, getting a lot of dollars, more money than you thought you would get (which hardly ever happens as we all know).

As legislation is passed, the amount of dollars is going to depend more on the condition of the national and state economy than it is going to depend on any data you have. But if you do not have the data, and if you cannot prove that money is needed, then you are going to have a lot of trouble trying to get that legislation passed, especially with the competition for dollars that education as a whole is experiencing right now. As you move through the model, regardless of whether you have more funds or less funds than you anticipated or wanted, programs do go into operation. Two things can happen when programs go into operation: you can carry out an evaluation of the program and find out what is happening, or you do not do an evaluation. If you do not do an evaluation you are probably not going to have much luck following this loop around. You are going to go back to the legislature the next year; you are going to have the same data or no data at all; you are not going to be able to tell whether the program worked or not; and, you are going to have more conservative legislation passed. If you do an evaluation, you can get reliable or unreliable data. Unreliable data is going to feed right back into the loop and, regardless of what your data shows, if people do not believe it, and you cannot show it is good, then you are probably not going to get any changes in legislation. Reliable data if it indicates success, feeds back into here and you get increased funding. If it indicates failure, then it can be recycled so that you can come up with alternative proposals and new types of legislation. What I am attempting to show is that you could start with very conservative legislation, and, with good research, you could end up with pleasantly philanthropic legislation after one or more turns through the loop.

This presents a good way to start looking at the problem, and I think it does give you an idea of the kinds of decisions that are going to be made on the basis of the research that you do. As I said, it can be applied to the campus just as well as it can be applied to a state legislature or Congress. One thing I know, whether you do the research as financial aid administrators or whether you do the research as institutional researchers, somebody is going to do the research. It may not happen on your campus, but there are other agencies that will do it if you do not, and you can get a lot of help from other agencies to do it.

Maybe you are already thinking to yourself, "We already know SO WHAT." We can point out to thousands, maybe millions, of students who have been assisted by this financial aid process in the last twenty years since 1957 when we had the National Defense Education Act passed. Maybe you can, but then there are people who will say, "There are thousands and millions of students who have gone through this process and received assistance--would they have gone to college anyway?" How many of them would not have gone? How are all the people that were in college before the programs existed financing their way? Are we helping the people who are simply scraping it together? Are we helping different people and what kind of people? There are some data on these questions and you

can look through it and dig it out; but, we still have a lot of convincing to do from our perspective.

Simply the amount of dollars that are being spent in the student financial aid area is another reason that we need to do some good research in this area, and some good studies. The competition for those dollars is, as I said, too intense not to try to get the answers. I do not think emotional arguments on the basis that there are people who need money will be sufficient any longer to get increases in the amount of student financial aid funding that may be necessary.

Some of the questions I think we still need some better data on and some better answers to perhaps are: what should student financial aid programs do? Should they provide access only, should they provide students with a choice of institutions, or should they do both? What is the evidence that the number of students going to four year institutions has increased because of the amount of student financial aid that has been made available to them in the past? Has the educational level of the citizenry really increased? Is there a squeeze on the middle income student on your campus--gosh, if you do not know that that is a big question right now, you have not been reading the papers! What will be the impact of tuition tax credits? What is the impact of under-awarding in the student financial aid area? You read all the time about over-awards and people not repaying their loans, but you and I both know there are lots of cases in which there are under-awards. What does that do to student enrollment and student retention? What about the students who have paid back their loans? What impact have those loans had on that particular group of students? Are the campus based programs more effective than non-campus based programs? Is low tuition a better way to attract more people to institutions than large grants? What is the difference between pricing of an institution and financing the price of an institution?

On these particular questions, people say, "Yeah, there has been a lot of debate about that, lots of studies, and lots of answers." I think what we have is that everybody has the answer to what they believe, but we have not really gotten to the point where we have answers that everyone accepts regardless of what they believe. One of the reasons for this is that the student financial assistance questions are not unrelated to all the other questions that relate to student choices and student decision-making. For example, we already know from studies on student attrition and retention that you simply cannot get to the point where you can identify a single factor and say that is why a student stays and that is why a student leaves. A student makes his or her decision on the basis of many things. Last week I gave a presentation on that particular topic and I listed about 30 things that happen to a student on our campus, none of them at the same time, but over a term.

The first thing that happened to him was that he lost his permit to register. There was a hassle about getting another one. Then, a couple of days went by and he could not get a book because the bookstore was all out of books for that particular class. He went by to get his work-study job and he found out that all the jobs had been taken already. So, even though he had a work study award, he could not find a job. And these things just kept piling up on him. He got a D; he got two A's; and so on and so forth. One day he gets an A back on one of his papers and the next day he leaves school. There are thirty different things that happened to this guy, each of which had some impact on his decision. What we have to do in our research in this financial

aid area, I think, is to remember that student aid is only a part of the whole process. While it may seem to you within the four walls of your office that is the most important thing that ever occurs on campus, oftentimes it is not. Student aid is tied in with all the other things and you have to consider that as you start talking about research and studies.

We could go on and list a lot of other questions. One of the most important, however, that you have to answer for yourselves is, "If someone walked into your office and said that all the federally based financial aid programs next year are going to be zero-based, how would you justify your request for assistance?" That is the key question we have to answer, whether we are on a campus, whether we are in a state agency, or whether we are advising legislative bodies.

Many of you probably already have conducted a number of studies on your campus, perhaps through things like institutional summary data services. One thing becomes increasingly clear from various studies on student decision-making and that is that while financial aid is a factor that affects decisions, it is only one of many factors, and it does not exist independent of the other variables. I think as we do this research, and determine what the relative importance of that financial aid is, the more chance we have of coming back through the good side of the Financial Aid Loop.

As we approach this year and the immediate future with the normal projections looking very glum in some respects, very good if you accept some of the other assumptions that I made about them, then the SO WHAT question is going to become increasingly important. I think we need to know if there is a cause and effect relationship and to establish once and for all that the cause/effect relationship between financing and student decisions exists. Perhaps during conferences like this we can discover the methodologies that will help us find an answer to the question of the relative contribution of financial aid to the whole matter of improving access and raising the educational level of the citizens of this country. One thing I do know is that we cannot be like the king in the cartoon in the Saturday Review recently who was talking to his group of assembled knights and was concluding that the fact that all of the king's men and all the king's horses could not put Humpty together again simply means that the king needs more men and more horses. We have to be careful of putting ourselves in the position of simply saying that we need more dollars without justification for those dollars.

THE CHOICE PROJECT

Joan S. Stark
Dean of the School of Education
at the University of Michigan

The CHOICE Project (Center for Helping Organizations Improve Choice in Education) has its origins out of the federal amendments of 1976 requiring financial aid people to do certain kinds of things. Let me give you some more background on what led up to that being included in the amendments and on the rationale for the existance of the project.

Years ago there were lots of students looking at colleges, but not nearly as many as we have today, and there were lots of colleges for people to go to all over the country so colleges were not fighting for students as they are today. As the number of colleges increased, the number of students increased, and the information that was put out for students to try to decide which college to go to got more and more complicated. When the federal financial aid programs were introduced, more and more students could go to college, and it became much more difficult for them to determine what kind of financial aid they were entitled to and what particular colleges had to offer.

In 1972, as you know, the proprietary schools also became eligible for financial aid, so here is a student faced with a whole raft of information in some kind of a dilemma. Where will I go? Why should I go to a particular place and how will I get the money to go there? Sometimes colleges tried to do something about this as the group of students increased; they gave students more information. In fact, the College Board back in 1968 had some very definite propositions for giving students more information. The colleges did not take to it very well in 1968 because they had lots of students and they preferred to take their pick. Then things got a little tougher and the colleges started to expand the kind of information they were giving students. They started advertising on the radio, in newspapers, and doing things that were previously unheard of in higher education.

Some of the colleges and some of the proprietary schools also gave the students vague information; some of it even not so truthful. The student then became even more confused and the news media got hold of some of it and made a big play out of it, and Congress got very excited about it. When Congressmen got very excited about it, it was because their money was being spent to send these students to school. Congress acted so that even the best of the institutions that we think of when we give examples of the best institutions began to look a little bit bad to some people, and they started heaving rocks at us and throwing rules and roadblocks which we have not enjoyed very much. Telling us that we ought to be giving better information to students, particularly about financial aid because Uncle Sam's money was involved here, became the focus. In a sense, and officially in the federal government's view, Uncle Sam became the guardian of what was termed the student as a consumer. Now most of us in higher education do not like to think of the student as a consumer because that means that we are producing a service, a product, and the student is not very much involved in that profit- if you turn the analogy to its ultimate

conclusion. Nevertheless, in 1974 a federal committee on education said that the student was a consumer and the government has been acting very rapidly on that assumption ever since.

Some people are providing checklists for students so that they can go around and ask the same questions of all colleges and see what kind of information they get. There are a number of these checklists around now and a little booklet called something like, "Look Out for Yourself: A Self-Help Guide for Choosing Your College," which is being sent out by HEW. Some of these things have some connotations and wordings in them that we in higher education think are inappropriate, but the checklists are there, and you shall be seeing more and more of them, particularly the admissions people will see them. At the same time, adult students were beginning to complain about some of the services that they were getting. We have more adult students this year in community colleges, you probably have an average-age student of 29 years, and these guys and gals are used to dealing with the roof repairman and the garage mechanic and they are much more likely to complain than younger students. So we have had a raft of court cases and such and these are still going on.

For me, there are some compelling reasons why we ought to do something about this--let me just tick them off:

1. We have a professional responsibility to the student. Those of us who are educators are different than businessmen, that is why we object to the consumer analogy because we are not businessmen, and we are not out just to sell students services that the student has no use for or that are not appropriate for the student at that time.

2. Secondly, all of our institutions are quite unique. Sandhills Community College down the road is unique. There are all these different kinds of institutions, and they have diverse groups of students, and it is too much to have the federal government make rules that are supposed to apply to everybody when they do not fit the community college student and the university student equally well. So, our thinking is that we often have some rules that come from the ground up so that they can be applicable to what we are doing

3. Third, if we study ourselves in such a way that we can prevent inaccurate information to students, we are very likely to have some institutional improvement resulting from that. Because, when we identify our weak spots, we have some obligation then to begin to improve.

4. Public trust--the public is not very believing in what higher education says about itself anymore. The young people have watched a lot of television ads, and they know about high pressure advertising. We are using the same techniques and that makes it a little difficult to come across as very creditable. If we want to keep the public trust, we have to do a very creditable job and practice what we preach.

5. Lastly, and probably for many of you most importantly, one can make a very logical case for providing the information that students need in that the federal government would be less anxious to regulate us if we can demonstrate

to them that we are providing it. Now that is very difficult. Those of us who are financial aid officers know that it is difficult to demonstrate anything to the federal government, but we are operating on that assumption.

Several years ago, FIPSE (Fund for the Improvement of Post-Secondary Education) funded a group called the National Task Force on Better Information for Student Choice. This was eleven institutions and four resource agencies, and we got together and said, "What can we do about this problem of getting students better information?" We worked on that for two years and many surveys were done. The surveys showed that students wanted to know first of all--how much will it cost me to go? Next, cost- tell me how much the gross price is, then tell me how much financial aid I get, and what is the bottom line. What do my family and I have to pay? That was the most important question. Next after that, they wanted to know a lot more about instruction and instructors. What is the teaching like? What is the quality of education like? That is a really big question for those people who are institutional researchers to tackle. The relationship of programs to future careers was another important question that students ask. This we have begun to tackle; community colleges have helped and even the small liberal arts colleges are beginning to take an interest in this question. And lastly, what are the program requirements? "Tell me what I have to take, and don't change the rules on me midstream." These are the four major things that students found of interest.

The institutions participating tried to draw up a document called a prospectus, and that took many forms. One was a slide-tape show. In general they tried to be very accurate and they put interesting things in them. Well, we spent two years trying to define what was better information and we were unsuccessful. In general, we felt that it involved making precise statements about your institutions which could be backed up by hard data; as we move more and more into the courts, this might be more and more important. If we emphasize the distinctive features of your institution, it would include topics that affect students' decisions. Look at a college catalog and you will typically find lots of pages devoted to the donors, the board of trustees, on and on. But I warn you, do not say to a board of trustees that you ought to eliminate those 10 pages in the catalog because from a student's point of view they are probably useless. I made the mistake of suggesting that to them, and the board of trustees immediately threatened to withdraw their contribution. Fortunately, it was not my institution! If there was one way we can characterize what we tried to do in the Task Force, it was to say, "What would enable a student to say, when he looks at the materials, 'What is likely to happen to me if I attend this institution?'" That question has many dimensions, many facets. What is likely to happen to me socially, personally, intellectually, professionally? And what are accurate descriptions of policies and requirements?

Using an example from Barat College, you may have heard about their prospectus, they were very candid, saying some good things and some bad things. First of all, a very distinctive point about Barat College is that it is a woman's college and 60% of the faculty are women. They presented a survey that had been done that shows that woman's college graduates become more prominent in professional fields. But they also said that mathematics is a one-person department. Now that is fine, if you want to major in math, you probably ought not to come here. On the other hand, if you want to major in art, this is the place to come. Now students find that out after they get there in two weeks anyway, that this was not the place to come to major in math, but Barat got a lot of national headlines for saying it.

Another example is from a Business College, and they were very clear about what their goal was. Their goal was to train a student to be a secretary or some other office job. "We don't have any student activities," they said. "Our students come in the morning, they wear stockings and high heels, and they act like secretaries. You don't eat and smoke at your desk, and we'll put you through this course and in a year you'll be a crackerjack secretary, but no frills."

In the process of doing all this is where we found our worries to be taking place. The process of going through developing better information on the campuses involves just about everybody. Those cases where it was under the direction of the Institutional Research Office were extremely successful because that person was considered to be a neutral party. Those under the Office of Student Affairs were somewhat less successful because people tend to think that there is some pressure for recruitment of students or keeping the institution viable. So, institutional research is a good place to put the responsibility.

In the process we found that there were four stages that most of the institutions had to go through. First of all, they had to get everybody believing that better information was a good idea or expressing some kind of commitment to the process. Get that commitment at the top levels; get the President involved or the Vice President. Second, identify what you need to improve in your information. One way of doing this is just to gather a group of 20 students around and have them tell you what they wish they had known about the institution that is not anywhere in the material. The third step is to gather the information you need, and this is where the data collectors come in. There is a lot of data to be collected. Last, field test it; see how it works. Not just do the students like the material, does it look pretty, but what effect does it have upon student's decision making?

We found that the more people you involve on campus in the process of improving the information for students and convince them that it is desirable to go beyond the federal requirements which are there in the education amendment, the better off the project is. Get everybody involved in thinking about it. Give everybody time to think about the issues, and to look at the data. Those of you who have been through this will agree, but in general, colleges do not know much about themselves. As the colleges work through this process, they found that they did not have data that they really ought to have. They also found that they had conflicting policies; they saw the poor student being pulled apart by two conflicting policies in two different catalogs, and nobody knows what the right answer is. And, they also found out that in financial aid particularly, there were some interesting inequities. One particular college had adult students that were much disadvantaged by financial aid policies and adult students were 75% of their student body. They were catering to the 18 year olds and had almost nothing for the independent student that was most of their clientele.

Interesting things happened. Inter-office communications improved. The Financial Aid Office started talking to the Institutional Research Office, and the Admissions Office stopped talking to both of them, but that is beside the point. In general, we found that people began talking to each other. Faculty and staff became more aware of types of target populations that they were dealing with, kinds of student they were trying to get in. Secretaries became

very much aware of how things were written, and what they were saying to students on the phone. Some colleges tried to set up, and were quite successful at, training programs for secretaries, and they are often the first people students communicate with. If the secretary is rude to a student, you have lost a student; if a secretary does not know where to get the information you have lost a student. So that became to our colleges very, very important.

We found that relations between town and gown improved, and the college went out into the community to see what their students were doing after they graduated. They gained a better understanding of what kind of jobs were out there, and the industries and businesses in the community gained a better understanding of the college.

I am going to stop for now, but I shall continue later. The Task Force took a first step and Project Choice is trying to carry on with this work.

STUDENT FINANCIAL AID: FACTS, MYTHS, AND UNANSWERED QUESTIONS

Jonathan D. Fife
Director of the ERIC Clearinghouse
on Higher Education

I would like to address some of the myths that concern higher education and student financial aid and to talk about what we really know about student aid and future needs. As I was preparing for this speech, I could not help thinking about the story that is going around Washington about the very rich man who was dying. He had three sons and he very much wanted to give some money to them while he was alive so he could see them enjoy it. He called in his oldest son and said, "What would you like? What can I give you that will make you happy?" "Well, Dad," the son replied, "I'm very much into race car driving, and I'd like very much to have a race car." With that the father turned around and bought him the International Speedway and two formula-four race cars. He asked his second son to come in and asked him the same question and his second son said, "Dad, I really appreciate this, and you know how I am with horses." "Say no more, say no more." And the old man went out and bought him the Belmont Track and Seattle Slew. Then he asked his third son to come in. He was in the arts and craftsy stage (more artsy than craftsy), and he asked him what he wanted. "Well, Dad," the third son responded, "I'm into Walt Disney and all I want is a Mickey Mouse outfit." With that he went out and bought him the U. S. Office of Education.

I have a feeling that some of you think O.E. is a Mickey Mouse outfit, especially when you consider some of the things they are doing with student aid. Sometimes the reason for that is because they do not portray what my definition of a wise man is: a wise man is a person who can articulate your biases better than you can. O. E. has tended to establish rules and regulations that do not conform to our own biases, our own understanding of what we think student aid is doing, and that do not respond to the problems that students are having in getting into college. One of the reasons for that is they may not have sufficient institutional research data and good feedback from the people who are working in the field.

In preparation for this speech I went to San Francisco to the National Conference of Student Financial Aid Administrators. While there, I began to get the feeling that student aid administrators are more concerned with laws, regulations and forms than they are with the end results of what they are doing. I do realize that the regulations and forms are part of your survival system, but part of your accountability is also to the students and the institution you are serving. We all know the articulated goals for student aid: equal educational opportunity, access and choice, retention, and promoting diversity. But what are the institution's goals for student aid? Is it to attract a more diversified student body? Is it to allow low income students to have the opportunity for higher education? Or is it to allow the institution to survive by attracting any warm body that they can get? In many institutions such goals are not articulated well, and I think that is one of the basic things you have to establish in your particular institutions in order to understand the success of your aid program.

There is some conventional wisdom surrounding the effects of student aid that need more clarification and research. From the federal government level it is believed that student financial aid is the primary tool to attract students to higher education and to insure that they will stay until completion of their studies. In many ways this belief is a myth. Student aid is way down the list of what makes students go to college, what motivates them to decide to attend a particular college, and what keeps students from dropping out. There are many other pressures surrounding students that motivate them to go to college that have been identified in research. First and foremost is parental support--sufficient financial support as well as moral support, general encouragement, and solid value systems. For low-income students this support is often lacking. Going on to higher education, going on to college, is a goal that may be completely separate from the parents' set of values. For middle- and upper-income students this is not the case; going to college is assumed. You go to grammar school, you go to high school, and you go to college. It is assumed. It is part of their life. It is not a question of going to college, but a question of which college.

Academic success is the second criteria for motivating a student to go to school. Support from teachers, success in grades, and finding it fun to be a student leader, whether that be a student leader on or off the athletic field, helps a student to develop a positive attitude toward education. The whole academic experience can be the second item that causes real motivation to continue to be a student.

Peer support is the third pressure. It should be obvious that if a student's peers are going on to college it will be more likely that he or she will also want to go. School reputation and school location are the two motivating factors for college choice. Research, such as Astin's annual survey of college freshmen, continues to demonstrate that a school's reputation is the primary reason for student selection. This research also indicates that a student is more likely to attend an institution that is close to his or her home.

It should be understood that these pressures do not minimize the importance of student aid. If the student cannot afford to go to an institution, he won't go. But, unless he has the motivation to go to an institution, he will not apply for student financial aid. I think that motivation and student financial aid have to go hand in hand, and we have to recognize that and look at this relationship.

Another conventional wisdom is the myth of the "middle class squeeze." People talk about higher education becoming an hourglass, with a broad top of rich people who can afford college, and a broad bottom base of poor people who can afford to go because of student aid, and a very small middle of middle-class people. That is <u>false</u>. There is <u>no</u> middle class squeeze. Look at the data and you will see that there is no basis for saying that the middle class is being squeezed financially in relationship to what used to be. Tuition and fees have increased no faster than disposable income. There have been two studies that have been put out recently, one by the Congressional Budget Office and the other by the Library of Congress. What they report is that the cost of college has increased about 75 percent since 1970. Income has increased between 72-77 percent. The difference is 2 percent either way, and this is not enough of a difference to support the contention that the middle class is being unjustly squeezed. What we are having is a change in middle-class values. The end results are just as if there were a real financial squeeze.

What is happening is that the middle class is not your college graduates of the 1950's--it's your union workers of the 1970's. It's your steelworkerr and automobile workers who are making $20,000 - $30,000 a year. They did not go to college. They are living the "good life." They have a cabin by the lakeside; they have their Recreational Vehicle; they have their vacations in the mountains or at the shore. They look at their sons and daughters and say, "Look, you went through free elementary and secondary education. I'm making a good living without a college education - I'm not willing to put out so much money to send you through school that I will have to sell my vacation cabin or refinance my house." In short, today's middle class is less willing to make as large of a financial sacrifice to send their children to college as they were 10 years ago. It is a value system change, and we have to contend with it because, in the long run, we--the institution, the financial aid administrators, and Congress--are going to have to make a decision whether this change of values is acceptable. Are you going to say that these values are wrong, that present financial aid evaluation systems are right? That the middle class should contribute more to their children's education, and if they don't accept the consequences that there will be fewer middle-class students in college? Or are you going to adjust and make more money available to the middle class. This change in values in considerably harder to deal with than if there truly were a financial "middle class squeeze."

Another myth is that higher education does not have good economic return. There is one thing in the springtime that you can count on. You can count on some major newspaper or TIME or NEWSWEEK coming out with a story about some Ph.D. in sociology driving a taxicab. This type of story is supposed to demonstrate that college graduates cannot get decent jobs. However, the truth is that the job market has never been better for college graduates. The starting salaries for college grads have never been higher, and college graduates continue to have the lowest level of unemployment for our economic times. I also believe that recent analysis of return on investment has been inaccurate for several reasons. First, financial analysts state that high school graduates can get a higher rate of return on their money by investing what they would spend on college and working than by investing in a college education. Supposedly, they come out 40 years later with more money than if they had gone through college. This type of analysis is based on an unrealistic assumption, for who has $16,000 to $25,000 to invest when they are eighteen? Second is the question of foregone income. Recent studies based on the National Longitudinal Study of the High School Class of 1972, have indicated the past estimates of foregone income to be too high. If this is true, then this means that students are making a smaller total investment (foregone income plus real cost) and therefore their return would be much greater. And third, most of these analyses totally disregard social and affective benefits derived from a college education. The whole process of estimating college return needs to be reexamined.

There are a lot of things that we do know about the impact of student aid. We do know that financial support from parents enhances a student's chance of going to college and graduating. We know that loans have a negative correlation with retention for men and possibly for women. We know that association with work study programs has a positive effect on retention. We know that student dependence upon savings and other assets has a negative correlation

with retention. And we do know that students who have a very mixed aid package have somewhat of a negative correlation with retention versus emphasis on one type of student aid.

However, there are a lot of things we still don't know. For example, research indicates that motivation for going to school is based on parental support. But what type of parental support is important? Is it the financial aid from parents that causes students to be motivated to succeed in college or is it because of another facet of parental support? We know that loans are negative--but why? Is it because when a student obligates himself, he sees this obligation in relation to his family income and the larger the obligation is, as compared to family income, the more frightening and therefore negative it becomes? Participation in work-study programs has been identified as a positive influence on retention. Is it because of the income from work, or is it because by working with the same people, by having an employer and peers responding favorably to the student's efforts, the student wants to succeed?

What I am saying here is that while there is some reason why some financial aid is positive and some aid is negative, it may not be because of the financial aid per se, but because of other conditions, other atmospheres that exist around that type of aid. What do we know about these conditions? Right now, very little. In order to be able to select the appropriate aid for each student, we need to know more about the effect of different aid packages on different students.

Another aspect of student aid is its delivery system. Student aid administrators know that there are negative aspects about the current student aid programs. For example, the timing of awards is horrendous. We talk about the goal of choice; yet, because of the late awarding of aid, a student often has to make a decision about where to go to college before knowing whether or not aid is available. Either a student has to have a lot of confidence about what he is going to be doing and in his ability to get aid, or he's going to opt for a lower-priced institution. A student of low confidence is going to be very reluctant to select a high-price private institution if he does not know that aid will be forthcoming.

Then there is the question of the size of the award. What is a realistic appraisal of what students can afford and parents can contribute? The College Board came out with a study on what parents are reporting they are willing to pay for college expenses. This was significantly lower than what the current needs analysis schedules indicate parents should contribute. The question is: should such a schedule reflect what parents are expected to contribute, or what they really are willing to contribute? What is realistic?

Another issue is when students first consider going on to college. Is it in their senior year or is it much earlier? I think it is much earlier. For most of them it is when they make a decision to take the college prep program in their freshman year of high school. Or it may be when they are in the first or second grade and their parents indicate that they want them to go to college. If lack of financial resources has a negative impact on their motivation to go to college, then that information has to be brought out earlier. Both institutional researchers and student aid administrators should be examining their delivery system for information on student aid: in general for the state, and in particular for your institution. Does it come early? Early for me is the fifth or sixth grade at the latest.

Another major problem that I consider to be hindering students is the tremendous diversity of student aid programs. Where do students find student aid: at the federal and state government level, at their institution, from the local Kiwanis Club? It is a tremendously confusing area for students. I think that we as people within the institution can start lobbying for more centralized locations for awarding student aid. Or, if not for the awarding of aid, at least for a central location for information about the different sources. I did a report for the Governor's Study Commission on Structure and Governance of Education for Maryland on student aid programs in Maryland. I was quite pleased with it; we had something in the report to offend everybody in the state. What I proposed was that we really should have only two sources of student aid. We should have a central state source where all money--federal and state alike--should be located. We should then have institutional based aid to be responsive to the students' needs once they arrive on campus. With only two major sources of student aid the general confusion would be minimized and over-awarding and fraud could be prevented.

I think I am exceeding my time and your attention span, so let me speed up by just talking about a couple more items. First, we have some problems with research concerning the impact of student aid. Institutional researchers and student aid people have to work together more. There is not enough research here, it is not communicated well enough, and there are not enough longitudinal studies. It is too easy to do a one shot perceptual study. I know, I have done it myself. But, this is not sufficient. We have got to do more longitudinal work on impact. I do not believe that you can examine data that is already collected, data gathered for other purposes, and try to interpret it for impact on students. I believe that you have to follow individuals through their college experience to be able to really measure impact. We desperately need data and research studies that are designed specifically to measure the impact of student aid on students.

There are two final areas of concern I would like to discuss. First, there is limited research in the area of independent students. Twenty-five percent, one out of four, of the students applying for student aid today are declaring themselves independent of their family. The percentage is increasing, and the word is getting out. There was an article in WOMAN'S DAY a couple of years ago with the title, "Do You Really Want More Aid? Cut Your Kids Off Your Income Tax Two Years Before They Go to College." Magazines such as WOMAN'S DAY have large circulations, and if this type of article keeps up, we are going to have a lot more independent students. We need to examine what this means for student aid programs. We need to have some idea about what it means if 50 or 70 percent of these students declare themselves independent.

My last point has nothing to do with student aid programs per se, but about what it costs your institution to administer student aid programs. What is the cost of administering your student aid office; what is the cost to your institution to bring in a large percentage of low income students? Do you have remedial programs for them? Do you have special counseling for them? All this is part of the cost of bringing in low income students. Should the institution bear the cost or should the student pay through high tuition? When these costs are considered, does it change the overall admissions goals of your institution?

In summary, what I have been saying is that we have certain knowledge about the impact of aid but there is still much to be learned. We need more research, and we have a whole area of questions yet to be answered. Student aid administrators and student information and institutional research officers can work together to find solutions. However, you can do all the research you want and you can show it to your people inside your institution all you want, but it is not going to make much difference unless you start letting this research get outside your institution. Right now we are not getting that information out. It is not getting out to other researchers, not to Washington, and not to the policymakers. Until we do that, we are not going to make much progress in finding universal answers.

THE THREE R'S: REVOLUTION, RESEARCH AND REMEDY

William M. Geer
Director of Student Aid, UNC-CH

I don't really know much about research, and I don't really know much about mathematics. These things create a lot of anxiety in me. Particularly do calculators disturb me, and computers scare the hell out of me. But the kind of world and research in which we now are, deal particularly with the latter.

The 3R's deal with basics: revolution, research, and remedies. I very often ask my classes in history at Chapel Hill whether they are revolutionaries, and they all deny it. This is very un-American because that's how we got started--with a revolution. But we're very proud of it in the abstract, you know, because it happened 200 years ago. We organized the concept, we have parades about it, and fireworks and celebrations. I suggested a couple years ago when we were celebrating our 200th anniversary that the thing to do would be to tear up the Constitution that is 200 years old and start all over again. That seemed to horrify my fellow citizens, but I don't think it's a revolutionary idea. I'm trying to say to you that today, in my view, we live in a revolutionary era whether we recognize it or not, and we, as administrators of student financial aid and as people engaged in educational research, are a part--I think a major factor--of one of the aspects of that revolution which is taking place in our lifetime.

The kind of revolution that I am talking about has many beginnings. You could say that it began in 1945 with the dropping of a nuclear bomb on Hiroshima and we did it. But I'm going to say that the specific fact we are talking about started in 1957 when the Russians put up a thing called Sputnik. That is a Russian thing, and most Americans don't like Russian things. But the amazing part of Sputnik was that it created a new educational era in the U.S. I have a model of Sputnik on my desk. People sometimes ask me why, and the reason is because it marks the catalytic agent for the beginning of student financial aid in its modern form, and thus increased educational opportunity for millions of American young people.

Now when Sputnik first went up, it was a shock to the world, but one thing can be said about it--the Russians didn't feel it would last because we hadn't done it yet. A newspaperman sought out the Secretary of Defense, Charles Roesn, late of General Motors, who was famous in this country for big aphorisms. For example, he had said, "What's good for General Motors is good for America." When they found him, they found him on Mr. (Secretary of the Treasury) Humphrey's plantation down in Thomasville, Georgia. Mr. Humphrey, you may remember, was a man who had made his millions in the Steel Industry of Cleveland, Ohio, and there's nothing a Northern millionaire would rather do than buy a little plantation down South, and every now and then take off from making his millions and get on his plantation. Well, Secretary Humphrey and Secretary Roesn were down in Thomasville, and they found them out in the woods, and the Secretary of Defense of the U.S. says "Humpf, Sputnik? It ain't nothing but a hunk of iron." But the next day, it started bleeping, and we heard about a new word; it was

called telemetry. Suddenly we realized that it wasn't just a "hunk of iron"--it was a highly sophisticated tool of a new era, a revolutionary era. And it marked a period when cold chills ran up and down the spines of the majority of the members of Congress of this country, and they decided that if it was sophisticated, as it obviously was, that it hadn't been the product of the slovenly Communist, atheistic, godless, peasantry of the Soviet Union, that the Soviet Union had some sophistication in industrial production and scientific technology, and that young Americans then needed more education than they were getting. So in the next year the National Defense Student Loan Act was passed. We Americans can do anything in terms of overcoming odds because we're fighters and because we started that way. And we remain rather aggressive; Congress just passed a bill yesterday afternoon for $120 billion for military hardware, but they're still agonizing over education appropriations of a much smaller amount. But we took it as it was, and we are glad to get it in the educational community.

This was the beginning of federal financing of students who in their own situation did not have the money to secure education beyond the free public high schools. And so it became the latest step in the American Dream--the American Dream which is the hope that our children will have a better life than we do, that their fulfillment will be better. It has been said at conferences such as this that we are dedicated to the education of young people and in a way we are. But in other ways we are ambivalent about it. We say we favor education, but our actions speak differently, as I've just said in our appropriations bill. As a matter of fact, the word education is not in the Constitution--one of the reasons I'd like to see it revised. The word education is not there. We have no great federal universities; we have no national universities. All my life I've been wondering why we who are dedicated to education don't have a great, national, well-endowed American university. But we don't. On the other hand, we take it as a postulate very often, in another part of our minds, that education is a major part of the American Dream, and that it is necessary to have an educated citizenry if a democracy is to function.

Early in our history there were indications of that feeling. The Northwest Ordinance of the same year the Constitution was written, 1787, provided that in every township laid out between the Ohio and Mississippi Rivers and the Great Lakes there would be one section of land set aside for a school. In the Morrill Act of 1862 it was provided that land in the West would be used as an endowment for colleges to be established in the states to provide education in agriculture, mechanical arts, and technology. And those schools happily are with us in all states today.

The public school systems were established in the mid-19th Century, and in the 20th Century we began to have what I consider a bonus--federal grants for education in various ways. When I first went to Chapel Hill, there were very few federal grants and there was a depression and all our educational systems needed money. The great leader of North Carolina in education at that time was Frank Porter Graham, a marvelous man with great insights and big hopes for the future of young people. I heard Frank Graham many, many times pleading for Southerners to vote in favor of federal grants for education. We can be cynical about it now, but what Graham said over and over--and I paraphrase him almost precisely--he said, "They don't want to tell us (they meaning the federal government) how to run our schools; they just want to help us do it!" Well, they do help us do it, but of course the one that provides

the money has a hand in the regulations. I sometimes think that perhaps today's boom in education in recent American history was the G.I. Bill, which was a good investment in that generation, obviously. And then as I have said, beginning in 1958 the National Defense Student Loan Act and other legislation which has followed, provide today the opportunities that are available.

Nevertheless, and the bad news is, that these programs represent a mishmash of appropriations and contexts set up at different times, and not necessarily related well to each other, therefore creating a veritable jungle for students to wade through or for the administration of student financial aid. They were done piecemeal, and there very often were particular political motivations that have now faded in the past. For example, the Guaranteed Student Loan Program was a response 10 years ago in the Johnson Administration to a proposal by Senator Fulbright and others for a tuition tax credit which the Johnson administration did not want. The Basic Grant bonanza which has helped so many students was a part of the desire on the part of Senator Pell for recognition which in the end he did not fully get. And so for various reasons at various times, we have had congressional action in these directions and then following it, and of necessity, regulation to go along with it. These things as I conceive of them--and you may disagree with the word but I hope we will not argue about that--as I conceive of them, they are part of the general movement in this country historically, particularly in recent history, toward a socialist state which I think we are in. Certainly, at least you could agree with the term, "welfare state." And I hope you won't consider the word welfare pejorative because welfare for human beings has to be a good thing--it has to be a good thing no matter how difficult it is. In my conception, and I hear a great deal about regulation and I have already said that regulation follows money no matter who provides the money, we do not have free enterprise in this country except in our mythology. We are largely socialistic, which means simply that we are dependent upon the public coffers and the public law for the provision of a great deal of our services and a great deal of our production. That goes for Lockheed Aircraft Corp. or for financial aid for individual students going to college who need to go to college. If nothing is provided from publicly raised funds, then it is not necessary to have regulations. The law is demanding, the public is demanding, the taxpayers make demands, and Congress acts. So what I think, basically happily so, when funds are provided there is a context, and that is a legal context, and it has to be carried out. And the way in which it is carried out is with regulations.

I have a notion for another bumper sticker for America. I would like to see (and many of you who know me will know that I would like to see) free public education at every level for every young person; indeed, for every older person at every level as far as the human mind can go. I see no reason for public education to stop at grade 12. What is so magical about grade 12 in a complicated society, in a difficult world? That's not enough education, so why stop there? But if we haven't gotten to completely free public education or a great national university, then we do it by appropriating here and appropriating there, and setting up programs for this and a program for that. And I get very tired of programs, and sometimes I hope I never hear the word "program" again. A program for this, and a program for that with the appropriations and regulations that go along with it. But we do it in America with money. And so my bumper sticker suggestion is: "Education: We do it with money." And this is the way we have set it up.

The good news is that it started with an appropriation of $28 million dollars in 1958 for the first NDSL appropriations. In the current year, the year just ended, programs for student financial assistance amounted to appropriations of $4 billion. Four billion dollars! Now that seems like a great deal and just look at the figures which Jim Olliver gave us yesterday in his neat compiling of the recent record of the last 6 years. In 1972, $1.2 billion were appropriated and again last year, $4.2 billion. Or in the state of North Carolina, with the heightening of the level of the money provided for student financial assistance, $24 million in '72, and in '77, which was his last year, $69 million. That's a neat amount of growth. Another example is the Basic Grant program that only got underway in 72-73. Last year, 2 million students in round figures in 6,000 institutions in our country were awarded $2.1 billion in Basic Grants or about $1,000 each. Now this was revolutionary--this is revolutionary for this much change to have taken place in attitudes respecting post secondary education in only 20 years, in our lifetime. It has affected enrollment and it has affected the mix of students in our colleges and universities and postsecondary schools of all sorts. It has affected our institutions by making them dependent, if you want to look at it that way, and to some degree, semi-socialistic. On the other hand, I would like to couch it in terms of the goals (the idealistic goals) of America for its youngsters, and that is equal opportunity and freedom of choice as a greater fulfillment of the American Dream and, of course, that is the kind of thing that the welfare state is all about--providing a better life. If I use my word which you may consider pejorative--socialistic--socialistic support not only for students at NCSU or Isothermal Community College, but it is also socialistic support for the students at Meredith College. I am sure that the trustees at Meredith and its supporters would not like that word, or Sacred Heart, and you cannot do without them.

As the theme goes along, the middle class has our attention because the middle class has a plight. I have never known a time when the middle class did not have a plight, and the middle class always speaks of its plight. But I have not yet heard any middle-class person, and it is going to take some research to find out who a middle-class person is in our society, offer to be poor to get their children into school. They figure there is a postulate that if you are poor the government will educate your children, and they want their children educated. But none of them, to my knowledge, have ever offered to be poor. What I am particularly bitter about is, I say, that the middle class have their rewards on this earth in terms of cash and credit cards, and I am not going to worry much about them. But they worry about themselves, and the result of their worries--because they are middle class, they are articulate, they can write to Congressmen and finance them, they do read and own the newspapers, they can make themselves heard, and I suppose we are all middle class and a part of all that--the result is the Middle Income Student Assistance Act that is before the Congress now. Perhaps this is the place where you might put your basic research right now as to what the middle class is, and what it needs or does not need. I have heard some statements in these meetings about recent research that has to do with the middle-class squeeze. The middle-class squeeze is not so real as it is seen. I tend to agree with that research and I'm comfortably biased.

Research will help us through the transition, the revolutionary transition as I concede, from a society that did not educate its young people

beyond the public schools to a society that will educate its young people fully, I hope. But one of the reasons I have a personal interest in student financial aid is in my mind and goes back to an experience in my high school days. The brightest student in my high school class in a small Carolina Town never could go to college and did not go to college because her father was a very unsuccessful small town merchant, and in those days before the welfare state she had no chance. And I do not think I have ever experienced the sense of frustration of that brilliant young woman in her inability to fulfill her own life educationally. I do not think I will tell you what happened to her, but I consider it a waste of a brilliant mind. If we can go fully through this revolutionary change to the transition, that will bring us out to a point where all young people can have their educational hopes fulfilled. We undoubtedly will have to provide the data that makes it possible for people to understand the needs and do the research and communicate the results. And that is being done; a great deal is being done.

I am sure that I do not have to tell you that there is a great bibliography--I just happened to pull a few things off the shelf the other day as a case in point. I feel some pride in a group of papers done by the Southern Association of Student Financial Aid Administrators in Atlanta last December on such questions as student consumer information, refunding of overpayment, default in the NDSL program, the question of who is an independent student, the question of administrative consent to support financial aid programs, and the question of satisfactory academic progress for student financial aid recipients. I did not have much to do with it myself, but I think it is a real contribution. I find the publications of the College Board exceptional. You may know their Guide to Financial Aid for Students and Parents and their many other publications. The most recent one done by the Washington Office of the College Board is Middle Income Students: A New Target for Federal Aid. If you do not know these publications of ERIC or of the College Board, send for their list of publications and you will find them, I think, very fruitful and useful.

Research is the basis for a well-taken position to defend the educational goals which I am sure all of us seek. Charles Kettering, a famous researcher of a decade or so ago, defined research (and I think you will like the definition) as an organized method for keeping reasonably dissatisfied with what you have. And if we are to make progress, we need it. I do not find all research helpful, and I would like to say a word or two about my dissatisfaction with a great deal of the research I have seen in a modest little university in the middle of this state and in other places.

There are all kinds of things that go under the guise of research, and I am convinced that not all of it is useful. For example, there's a thing that I call "snip-it research" where they just take some little manageable problem that's snipped from a graduate term paper or just two pages in a journal by a college professor that does not say anything to anybody very much. For some brilliant ideas, two pages is a lot, maybe. But very often, it seems to me, it is just another reprint. Then there is undigested data which just pile up; meaningless--pages and pages of it. Then there are surveys. My God, there are surveys all over the place. Now I think you have to have some surveys, but many of them are useless. I, myself, got interested in the survey problem a few years ago and decided that what was going on was not good enough and that I could improve upon it.

What was going on at the time, and there has been a proliferation of this since, was the Gallup Poll. Everybody thought this was just great, and it was doing fine until about 1948. What they had done was to take 200 million people and reduce it to a scientific sample of 2,000. They could consult this sample and then decide what the American people thought, how the American people were going to vote, or what the American people wanted to do. Well, I decided if that was a scientific survey, then the next step ought to be taken, so I invented the Bill Geer Scientific Political Poll. The survey worked out beautifully. Very scientific.

Well, you know of course, that surveys are useful and scientific samples are better than they used to be and certainly polling and survey research is better than it ever was before. I am sure that in this group and other groups like it there is good research orientation and that the usefulness of this research is, in practical terms, inestimable in making policy, in providing students with information, and in creating better public understanding and acceptance. I simply am impressed in this conference with Sally Horner's research results at Meredith College where she has studied college costs and the resources of the college in a thoughtful, honest, and (I am sure) helpful and useful way. Or Joan Stark's approach to consumer education with a very fine scientific attitude and good results. Remedies are going to come out of the kind of work in which both of the groups represented here are participating.

Research has to be one of the best answers to the problems we are trying to remedy and solve, but data are needed. I never hear people in Washington who deal with the Congress advise anyone to write their Congressman unless they can give a factual basis for your opinion. The opinion, or the request of itself, is largely useless unless you can show a Congressman why it is important. Do not ask a Congressman to vote without giving him some basis, some reasonable basis, for his vote. I am convinced that politicians are moral people who are trying to do good, overwhelmingly so, and I would put them up against any other group in our society. They want data--they want to know. If we do not provide it, there are paid lobbyists who will. So it is up to us if we are interested in the education of our students. Now it is true and it has been said that financial aid administrators do not have time to do research, and this is why it pleases me so much that these two groups have come together in this conference. Financial aid administrators are busy with the personal problems of individual students, with regulations or the lack of them, with audits, with this, that, and the other, and very often with little or no computer support. Let's be serious about computers for a moment. You can help; that is, you in I.R. That expression has bothered me throughout this conference; I keep referring to "I.R." but there is another letter that usually comes behind it, "S", and I keep waiting for the other shoe to fall. But seriously, there was a very able I.R. person and a financial aid administrator who is also very able who came to the I.R.'s institution about five months ago, and these two people in that five months have only communicated with each other once at a formal meeting. That is too bad. Now I know that I.R.'s and financial aid administrators, F.A.A.'s, are busy. But able people, both of whom in my view want to do a great deal for the quality of the education of the students in their institution, need to get together, and I am sure they will, but the effort must be made.

There are similar issues to be solved, or certainly to be looked at, and a major one to focus on is student communication. Student communication is difficult, and I agree with Joan Stark that nobody reads the college catalogs. She has found out through research (I could have told her that anyway), but she probably knew it to begin with. At any rate, we have bulletins that are complete but not read. We have bulletins that are slick (and therefore incomplete) and are not read. We hold workshops where people apparently do not listen. We deal with student audiences, and I heard one of our group say this morning that he talked with every student involved in student financial aid at his institution; but, did they hear? I think the most frustrating thing that has come to me recently is a letter that is on my desk right now. A guidance counselor, who works long and hard in our schools to teach the awful technicalities of student financial aid, writes me this letter, and I quote it almost precisely. She says, "Dear Bill, I have been a guidance counselor in this high school for the last 15 years." "Now," she says, "my son David is ready for college. What must I do?" That's what it says! "What must I do?" For 15 years she has been teaching young people what to do. Now David is ready for college; what must she do?

There is the problem of tuition tax credits. Tuition tax credits do not benefit students--it may be a tax change for Dad, for Mom--but it does not finance students directly. Not at all. Your daughter is in high school now or has just finished high school and is getting ready for higher education this fall. There is no money yet because she has not gotten there yet, and there is no tax credit yet. The bills are due, however. But tax credits have been very popular in this country and certain polls show that. But from the Chronicle of Higher Education: H & R Block Company, the tax people, hired someone to run a survey. They found that 34% of middle-income people eligible for financial aid prefer student financial aid through the colleges, through the universities and postsecondary institutions directly so they could keep their charges down. The rest prefer to see some other method of financing such as the Middle Income Assistance Act or the College Opportunity Act. I happen to think this is a very good survey. But only 14% favor the $250 tax credit, and only 9% favor tuition tax credits in general, so that is a small minority. Twenty-three percent as compared to 54%. I think the tax credit issue can be handled with data.

Data is going to be needed also in the next few weeks for the forthcoming FISAPPS. If you do not know what the FISAPPS is, it is the fiscal operations report of the student financial aid office combined with applications for funds for the next fiscal year. This is a new kind of form which has not been released yet. But when it is, it is going to make all of us shudder. I have seen some early copies of it, and I am not too happy about it; but, I tell you data is going to be increasingly important if that idea hasn't impressed itself on your minds up till now.

We also need research about the independent student--all of us know that young people today are increasingly independent of their parents psychologically and very idealistically at times. They want to grow up, and I think they should, certainly if they are my children. We brought them up that way, and they are. If they want to tell their old man to go to hell, they tell him to go to hell. One young man walked into my office not long ago and he

said those very words. He said, "Mr. Geer, I just told my daddy to go to hell; so now I'm independent." His father happened to be a neurosurgeon in a N.C. city making more than $100,000 a year. So that created a problem, the least of which comes under federal definition. Problems for him, problems for us, and undoubtedly problems for his dad. Another student told me, "Mr. Geer, I just can't get along with my daddy. If I won't shave my beard off, he won't send me to college."

Seriously, there are real problems in our society. We live in a kind of world in which young people need to grow. We need to know what the attitudes of our young people are. We need something beyond the arbitrary definition of financial independence. You know what they are and I won't go into that, but they are not realistic. We need data. I keep saying in the Office of Education that we do not need a new definition of an independent student; we need a sociological study of young people in America to find out where they are in respect to their attitudes toward their parents and toward themselves and towards self-support or independence.

There is the planning problem. Joan Stark said yesterday that there is a real planning problem. The problem was, as she defined it, that students must decide in March or April where they are going to college, yet they do not get their financial aid package until May. She does not understand; the planning problem is much worse than that, and with due respect to all involved, you finally get all your aid packages put together and then in middle or late July come the N.C. Student Incentive Grants, and they all have to be torn up and done all over again. Planning is a real problem, and none of the programs fit together. We are going to have a terrible problem with SERs (Student Eligibility Reports) this year. I was talking to the Basic Grant folks about two weeks ago. They said turnaround time is about a week or 9 days at most, and I said, "Nope, not a week--it's a month or 9 weeks." They phoned me later saying they had discovered that I was correct and that they were going to try to do something about it. I do not know what they are going to do about it, because school opens in two weeks.

Concerning the administration of student financial aid and who should pay for it: should the administrative cost allowance be 3% or 4% or 10%, and should there be some recognition of the cost of administering basic grants on the campus where the real work has to be done? Maybe we need some research on that.

Where is the locus? Where should the locus of student aid be? Now we have a mishmash. There are federal programs centrally administered--the Basic Grants. There are state programs administered in 50 separate states with 50 separate contexts. There are institutional programs with their own contexts, and there are the campus-based programs administered in institutions subject to federal regulation. It's a mishmash. We are glad to have the money, but what happens two weeks after school has started and the student has not received his financial aid? Where should the locus of student aid be?

And then the question that Stan Broadway addressed this morning (and it is a serious question), and that is the business of the loan indentureship. Millions of young people in our country are now subject to loans. Well, if you want to toss it off you can say, "What's so bad about that? It's the American way." Nevertheless, and seriously, educational loans can create a

great debt on our young people, and we have piled up debt on top of debt with the result that we have had some defaults. I was told that the default rate is not as serious as is being said in the public press. The default rate for young people who have not (many of them) set up their careers is 13% nationally in the Guaranteed Student Loan Program and 18% in the National Direct Student Loan Program. This represents about a million borrowers in default but 11 million have been educated (in round figures) in the Guaranteed Student Loan Program in the last 10 years, and about the same number by NDSL in the last 20 years, and I consider that a plus. Mr. Califano in his testimony before Congress last week said that of our 3400 institutions, 200 had default rates of 50% or more on their loan programs which they administered for the federal government. But, more importantly it seems to me, is that of the 3400 institutions, 1,071 institutions (or more than a third of them) have default rates of less than 10%, and I consider that a good record. Many institutions have even lower default rates. As a matter of fact, if you compare the default rates of the banks, the major banks of this country like Chase Manhattan Bank or NCNB, with the student default rates in many institutions, I think the student default rates come off better.

We could name many, many more student aid research problems. We need to work together, obviously, and that is why we are here. Student Financial Aid (and the research that supports it) is a major social achievement, the central revolution of our time. It is the principal means of federal funding for educational institutions. It is the best investment that we are making in education for future citizen-leaders of this democracy and the fulfillment of their hopes. It needs and deserves our best effort, as financial aid administrators and as researchers and supporters. We need great research to improve it, and I am glad that we all got together.

ABSTRACTS

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CODE A - INSTITUTIONAL GOALS

1. PLANNED DIVERSITY: A PUBLIC POLICY FOR INDEPENDENT HIGHER EDUCATION IN NORTH CAROLINA (MAY 1978). James Olliver, Acting Executive Director. North Carolina Association for Independent Colleges and Universities, Raleigh.

Planned Diversity is the policy statement adopted in May of 1978 by the Council of Trustees for Independent Higher Education. It is intended in its broadest sense to provide a framework for cooperative planning of a system of undergraduate education in the 1980's which is equitable, efficient, and effective in meeting the needs of the people of North Carolina, while maintaining the strong dual system which has served the State long and well.

The report was written to address from the perspective of the independent sector the responsibilities it feels as a result of statutory requirement that the University of North Carolina Board of Governors consult with independent colleges and universities in the development of a statewide long-range plan. The document represents a basic position long espoused by the State's independent sector. It includes policy assumptions, concerns and options which are considered central to the development of the coordinated system of higher education for the State as is specified in G.S. 116-11(1). Findings and recommendations are made which address the basic state policy questions related to independent higher education, and options are suggested which minimize governmental expenditures and maximize student access and choice while utilizing the resources of the independent sector most effectively.

It is not, therefore, intended to be a long-range plan for the independent institutions or the sector as a whole and does not attempt to address or make recommendations concerning the full range of complex educational and contextual issues which confront the State's independent colleges and universities.

CODE C - FACULTY

FACULTY FRINGE BENEFITS PLANS: A REPORT ON NINETY-SIX COMPLEX INSTITUTIONS (1978). James R. Montgomery, Director, Office of Institutional Research, Virginia Polytechnic Institute and State University, Blacksburg.

In conjunction with a faculty subcommittee, a questionnaire on faculty fringe benefits was sent to 117 institution presidents. The 96 surveys returned represented land grant (45), other state supported (28), and private (23) institutions of varying sizes. Findings included that at least partially financed disability insurance programs are provided by 73% of the institutions, with 46% providing optional totally employee-funded group plans. Basic health insurance plans with hospitalization, surgical and major medical benefits are provided by 96%, with 86% of these having a set dollar limit on major medical. Approximately 92% of the institutions furnish at least partial financing for employee life

insurance. Forty-five institutions provide such coverage for retired faculty. Faculty retirement benefit programs include 57% with fixed contribution plans, 25% with fixed benefit plans and 18% with both. Most institutions set a minimum faculty contribution of 4-6% of faculty salary. Faculty are permitted to increase retirement contributions at 57% of the institutions and a cost-of-living adjustment is provided by 49% of the state institutions. Other benefits considered included Social Security payments, course fee waivers, housing, discounts, and special retirement benefits. Of the state institutions, 51% noted some contribution to fringe benefits from sources other than state funds.

CONSTITUTION AND BYLAWS
FOR THE
NORTH CAROLINA ASSOCIATION FOR INSTITUTIONAL RESEARCH

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ARTICLE I NAME

The name of the Association shall be the North Carolina Association for Institutional Research.

ARTICLE II PURPOSES

The major purposes of this Association shall be: (1) to provide for professional development; (2) to provide for the dissemination of information and the interchange of ideas on problems of common interest; (3) to contribute to the advancement of post secondary education in its fullest and broadest implications; and (4) to foster a friendly spirit of unity and cooperation among persons having interests and activities related to institutional research.

ARTICLE III MEMBERSHIP

There shall be the following three categories of membership: individual membership, institutional membership and organizational membership. Each category of membership shall have only one vote.

Section 1. Individual Membership shall be open to any person engaged in institutional research, or who has interests and activities directly related to institutional research.

Section 2. Institutional Membership shall be open to any post secondary educational institution.

Section 3. Organizational Membership shall be open to any professional organizational or educational organization with interests and activities related to institutional research.

ARTICLE IV OFFICERS

Section 1. Officers - The officers of the Association shall consist of the President, the President-Elect, the Secretary, and the Treasurer.

Section 2. Duties of Officers

President - The President shall: (a) serve as Chairman of the Executive Committee and preside at all meetings of the Association; (b) represent the Association or provide for appropriate representation for the Association at national, regional, and local conferences or meetings of interest to the Association; (c) act as spokesman for the Association; (d) have general responsibility for promoting membership in the Association;

(e) appoint committee members; and (f) perform any other duties necessary to assist the Association in achieving its purposes as stated in the Constitution.

President-elect - The President-elect shall: (a) perform all of the duties of the President in the absence of that officer; (b) assist the President; (c) serve as Chairman of the Program Committee for the annual meeting; (d) perform other assignments which may be delegated by the President; (e) assume the duties of the President in the event that an unexpired term of the presidency occurs; and (f) assume the office of Presidency at the end of the President's term.

Secretary - The Secretary shall: (a) keep and publish annually an accurate listing of the members of the Association and provide a list of active members during the annual meeting; (b) keep the minutes of the annual meeting and the meetings of the Executive Committee; and (c) shall have the responsibility for printing and distributing at the earliest possible time, the proceedings of the annual meeting.

Treasurer - The Treasurer shall: (a) collect annual dues; (b) provide the payment of duly authorized expenses of the Association; (c) prepare formal financial statements for the executive committee meetings and annual meetings; and (d) perform any other duties assigned by the President.

Section 3. Term of Officers - The term of officers shall be one year. All officers shall assume office at the close of the annual meeting at which elected and serve until the close of the annual meeting coinciding with the completion of the term for which they are elected.

Succession - The Secretary and Treasurer are eligible to succeed self, not more than two consecutive times, in the same office.

Section 4. Election of Officers - All officers shall be elected at the annual meeting by a majority vote of those members present and voting. Voting shall be by written ballot.

ARTICLE V EXECUTIVE COMMITTEE

Section 1. Composition - The Executive Committee shall be composed of the President, President-elect, Secretary, Treasurer, the immediate Past President, and three Members at large elected by the membership. The President shall be the Chairman.

Section 2. Duties - (a) The Executive Committee shall have the general supervision of the affairs of the Association between its annual meetings, fix the hour and place of meetings, make recommendations of the Association, and perform such other duties as are specified in the Bylaws; (b) the Executive Committee shall function as the Budget Committee; and (c) in addition, shall pose questions with the President on important policy matters.

Section 3. Vacancies - Unless otherwise provided for in the Constitution, the Executive Committee shall have the authority to fill any vacancy by appointment for the unexpired term. Any individual appointed by an unexpired term shall be eligible to succeed himself and to serve a full elective term as provided for in the Constitution.

ARTICLE VI BYLAWS

The Association shall adopt Bylaws for the conduct of its affairs not inconsistent with this Constitution. Such Bylaws may be adopted, repealed, or amended at any annual meeting of the Association by a majority of the members present and voting, provided that the proposed amendment to the Bylaws shall have been circulated at least 30 days prior to the annual meeting.

ARTICLE VII AMENDMENTS

This Constitution may be amended at any annual meeting by a 2/3 vote of members present, provided the substance of the proposed amendment shall have been submitted 30 days prior to the meeting in the call of the meeting.

Section 1. Meetings - The purpose of the Association will be served by annual meetings, special meetings, and executive committee meetings. (a) The Annual Meeting of the Association shall be held during November of each year on a date determined by the Executive Committee; (b) Special Meetings of the Association may be called by the Executive Committee, or by petition of ten percent (10%) of the active membership; and (c) the Executive Committee shall meet twice, once in December following the annual meeting (Budget Meetings) and at another time so designed by the President. Special Meetings of the Committee can be called by the President.

Section 2. Membership Dues - There shall be two categories of dues, individual and institutional/organizational. Annual dues for the individual membership shall be five dollars ($5) payable upon acceptance of membership. Annual dues for institutional/organizational members shall be twenty-five ($25) payable upon acceptance of membership. Dues are due at each annual meeting and must be paid by September 30 for a member to have active status at the annual meeting. The dues year is from the date of each annual meeting to the next annual meeting.

Section 3. Voting - For voting purposes, each member, individual or institutional, shall have one vote. Individual members are entitled to one vote. Organizational and Institutional members are entitled to one vote cast by a designated representative of the organization or institution.

Section 4. Fiscal Year - The fiscal year of the Association will be from January 1 through December 31.

Section 5. Committees

A. A Nominating Committee of at least three members shall be appointed by the President no later than October 5 for each annual meeting.

B. A Committee on Program and Local Arrangements shall be appointed by the President for each annual meeting.

C. An Auditing Committee shall be appointed by the President for each annual meeting. This committee shall audit the Treasurer's books for the preceding year.

D. The Membership Committee shall be appointed by the President.

E. Such other Committees as deemed necessary for the welfare of the Association may be appointed by the President.

Section 6. Quorum - A quorum to conduct the business of the Association shall consist of 25% of the active membership.

Section 7. Procedure - The latest edition of Robert's Rules of Order shall govern all meetings of the Association insofar as they are applicable and not inconsistent with the Constitution and Bylaws of the Association.

Section 8. Amendments - These Bylaws may be amended in any annual meeting by a majority vote of members present and voting provided the substance of the proposed amendment shall have been submitted 30 days prior to the meeting, in the call meeting, or at the previous meeting.

Ratified, January 1973
Revised, November 1976
Revised, November 1977

NORTH CAROLINA ASSOCIATION FOR INSTITUTIONAL RESEARCH

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(Continued from inside front cover)

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